HubSpot Product Updates

April 2024 (March 2024 Updates)

Update of the Month

HubSpot

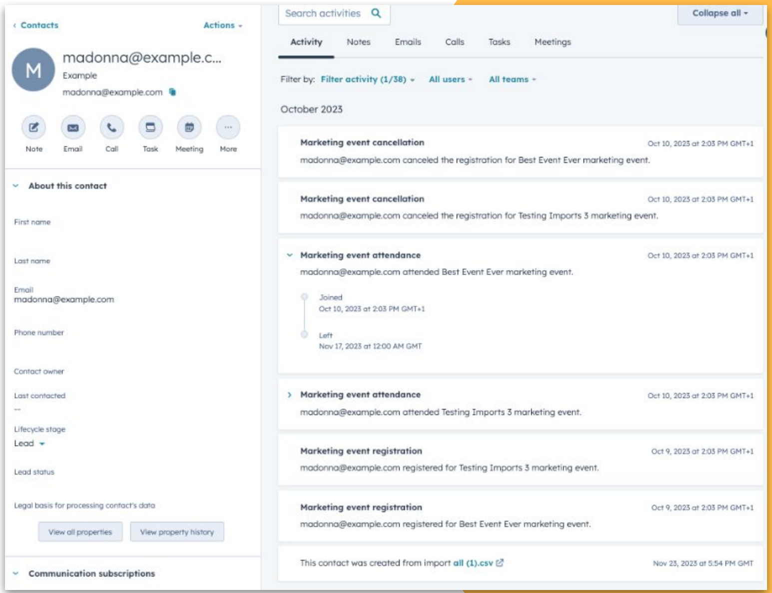
CMS Hub	Content Hub
Website Solution	**Complete Content Marketing Solution**
Blog Content	**All Content types: podcasts, case studies, videos and more.**
Content must be hosted on HubSpot	**Content hosted on any platform** can integrate.
CMS Category	**CMP & DXP Categories**
AI Assistants	**AI infused content creation tools**

Marketing Hub™ + CMS Hub®

Marketing Hub™

Import Offline Event Data to HubSpot Marketing Events

We have now launched a new import flow for Marketing events. You can now import all your marketing events data into HubSpot for your events. This will allow you to bring all your marketing events data into HubSpot - selecting from a range of integration for your online (virtual) events and using our new import flow for non-integrated events.



Use Case

Marketing events object in HubSpot can be used for your non-integrated Marketing events activities, with our new imports flow. This means that customers can now bring ALL their Marketing events data into HubSpot, and use the power of HubSpot Marketing events to manage and automate their event activities.

[Learn More](#)

Free Starter Pro Ent Live

Launch region: Global

Marketing Hub™

Business Unit updates to the navigation, record creation, and opt-out imports.

Business units is now selected from the navigation, which will allow that context to be kept as users navigate across tools and applications that support business units.

Use Case

Customers can select the business unit in which they want to operate, at the account level, within the navigation bar, instead of being selected within each individual action or feature. As part of this change CRM records will be automatically tagged by the selected business units during creation as well as opt-out contacts during an import.

**Must have Business Unit add-on*

[Learn More]

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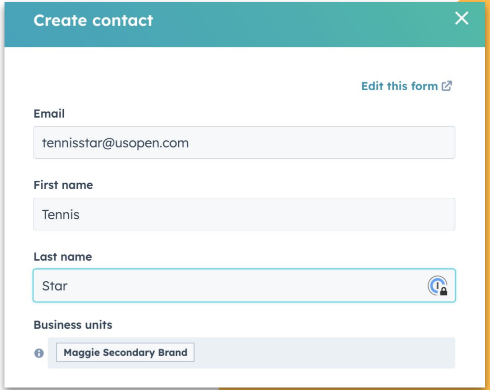
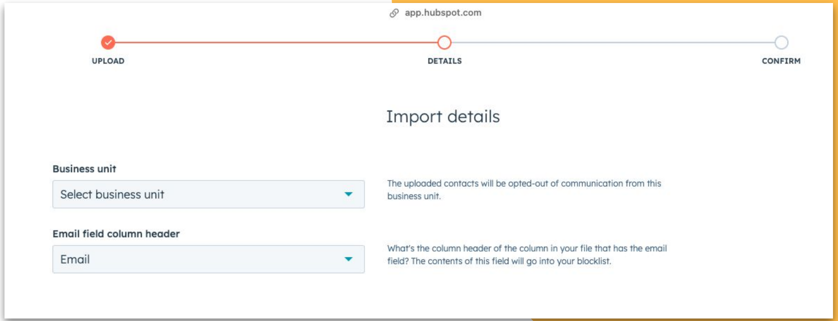
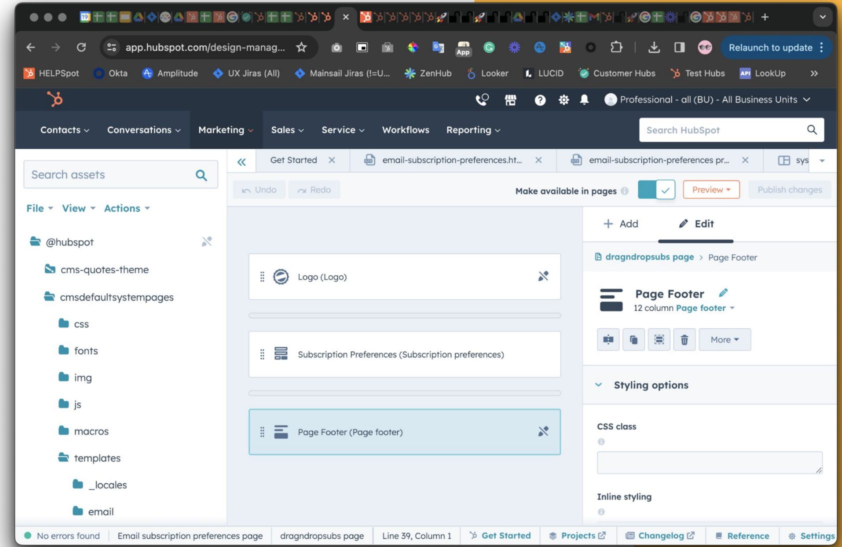




Marketing Hub™

Use Design Manager to customize Preference Page per Business Unit

Customers can now customize their Preference Pages per Business Unit using the Design Manager experience -- the same functionality as outlined [here] is now also available for Business Unit customers! Create a new template or modify existing templates using Design Manager for your Preference Pages and assign to each Business Unit.



Use Case

Ability to customize and modify their Manage Preference page to mirror the look and feel of each Business Unit.

**Must have Business Unit add-on*

[Learn More]

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Launch region: Global

Marketing Hub™

Create a unique, customizable resub email per Business Unit

Business Unit customers can create unique, customizable re-subscription emails per Business Unit and toggle this experience on/off per Business Unit from the Subscription Settings page.

Use Case

Contacts who unsubscribed from marketing emails will need to take action to resubscribe to your emails or update their email preferences. Now you can create custom resubscription emails to mirror the look and feel of each of your Business Units.

**Must have Business Unit add-on*

[Learn More]

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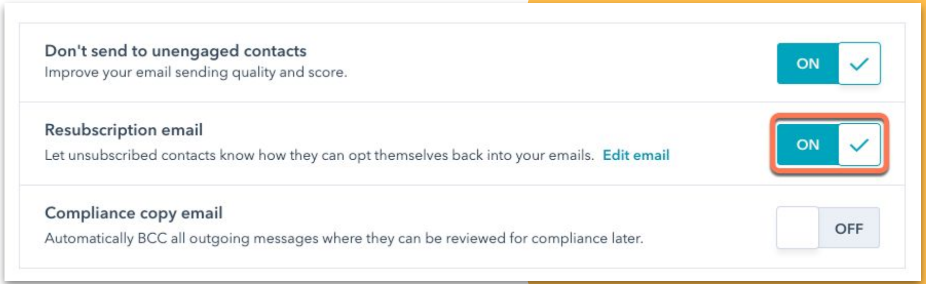

Marketing Hub™

Social Monitoring AI-Powered Quick Replies

When someone mentions your brand, you can respond swiftly and intelligently with just one click. Our system analyzes the context of the conversation, ensuring your responses are not only quick but also tailored to the nuances of your social audience.

Use Case

Marketers juggle numerous responsibilities, from keeping an eye on their audience's social media interactions to responding promptly. With a plethora of tasks and challenging discussions unfolding on public channels, our users often find themselves stretched for time. We're here to simplify the process, making it easier for our customers to foster a thriving community. By providing assistance with replies, we empower our users to respond swiftly, fostering quicker connections with their leads and customers on social media.

[Learn More]

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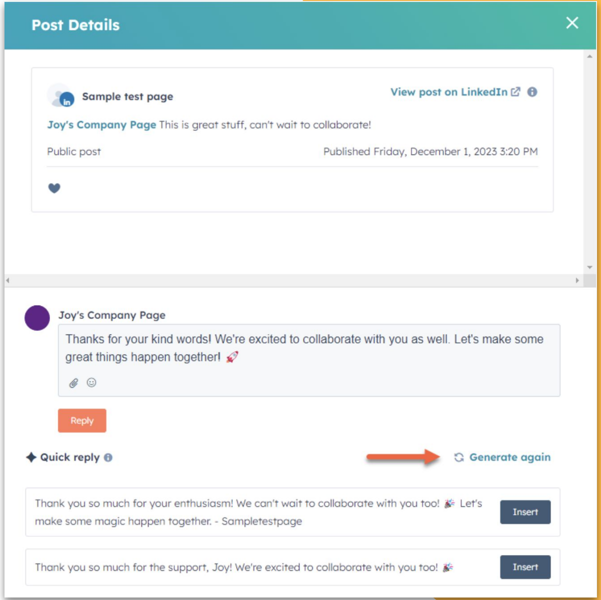
Launch region: Global



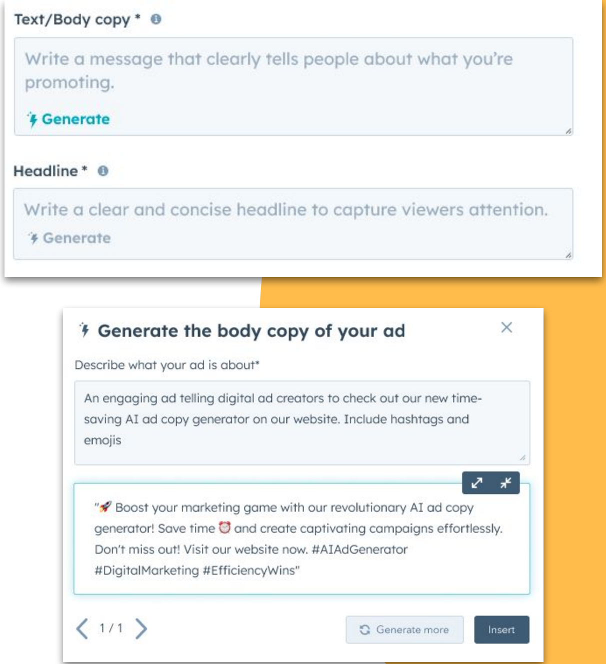
Marketing Hub™

AI Assistant for Engagement, Website Visit, and Lead Generation Ads

HubSpot users can now use AI Assistant in Ads to generate ad copy from scratch using simple prompts for engagement, website visit, and lead generation ads.

Use Case

You can now use the AI assistant in Ads which will enable you to generate ad copy from simple prompts. You can also rewrite, expand, and shorten generated copy to give you more control over the AI-generated text.



[Learn More]

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Launch region: Global

Marketing Hub™

Opt-out a contact from all communications per business unit from contact record

Previously, the "opt out of all" action available in the contact record would only apply the opt out to the Account Business Unit. Now, portal users can opt out a contact from any Business Unit.

Use Case

Perform an "opt out of all" action for your contact for any Business Unit, not just the Account Business Unit.

**Must have Business Unit add-on*

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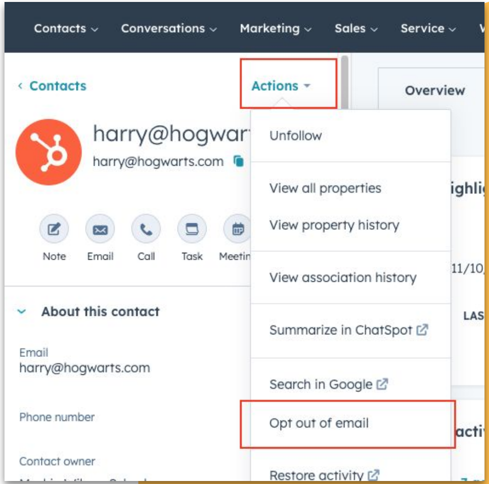
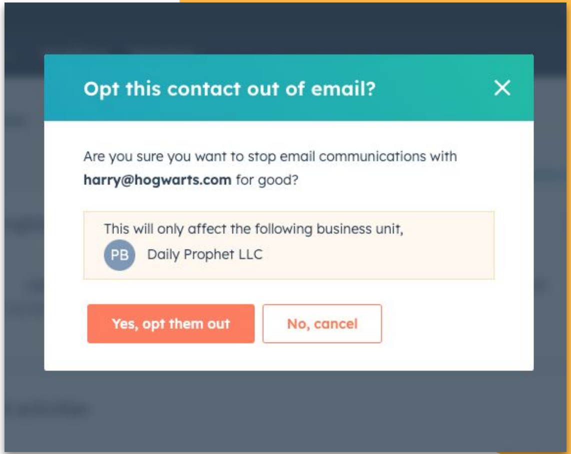
Launch region: Global



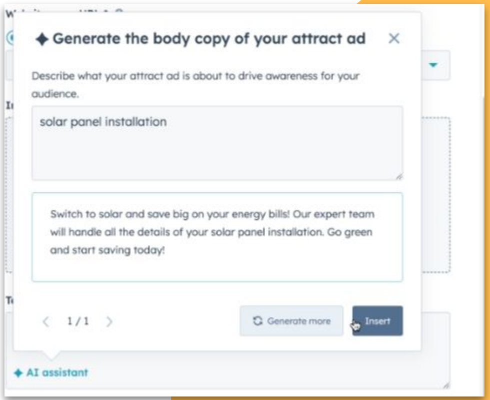


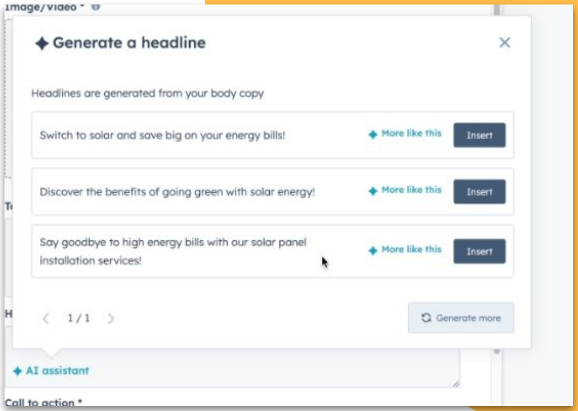
Marketing Hub™

AI Assistant for Facebook Ad Sequences

HubSpot users can now use AI Assistant in Ads to generate ad copy from scratch using simple prompts for Facebook ad sequences.

Use Case
You can now use the AI assistant in Ads which will enable you to generate ad copy from simple prompts. You can also rewrite, expand, and shorten generated copy to give you more control over the AI-generated text.





[Learn More]

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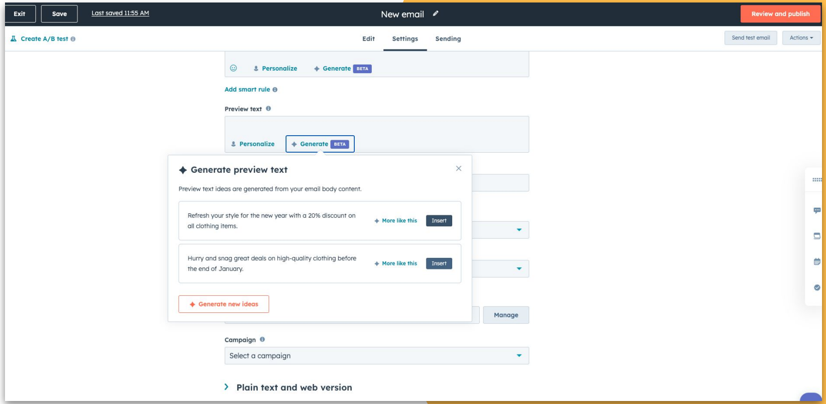
Launch region: Global

Marketing Hub™

AI Assistant: Preview Text Generation

We are excited to announce the release of the HubSpot AI Preview Text Assistant for Marketing Email. Content creators can now easily generate preview text for their campaign, complimenting the ability to generate a subject line within the Email Editor.



Powered by email insights and best practices from HubSpot, the Preview Text Assistant will read the content of your marketing email and subject line and generate relevant preview text accordingly. You will not need to prompt the tool, instead you can generate preview text on the click of a button.

Use Case

With recent advancements in generative AI, we want to provide customers with the ability to quickly generate preview text for their marketing email, encouraging them to further utilize this functionality in the HubSpot Email Editor.
Learn More

Free | Starter | Pro | Ent | Public Beta

Launch region: Global

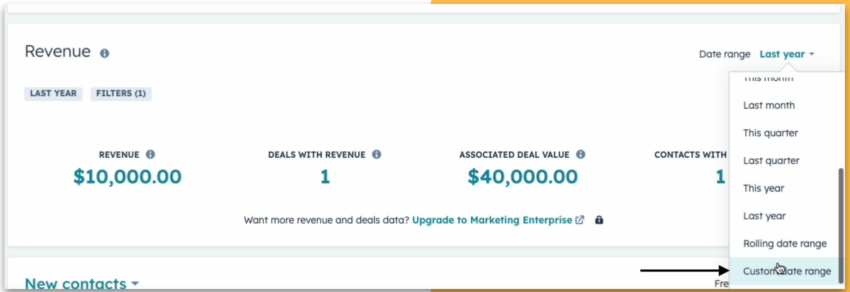
Marketing Hub™

HubSpot Campaigns: 3 years of historical revenue data

In the last months, we introduced 4 new 'revenue' metrics into the Campaigns performance page:

- Revenue
- Deals with revenue
- Associated deal value
- Contacts with revenue

We have now increased this limit from previously 1 year to now 3 years.



Use Case

This ensures that businesses with longer sales cycles or/and longer campaigns continue to successfully evaluate the performance of their campaign(s).

Free Starter **Pro** Ent **Live**

Launch region: Global

Marketing Hub™

A refreshed look for Marketing Calendar

The Marketing Calendar has introduced some new improvements to make it easier to see at a glance what is scheduled and published on any day or week.

We've added some more color and helped reduce the amount of scrolling needed to uncover the most relevant information marketers want to see.

Use Case

Enhance visibility and usability for marketing teams, making it easier for you to stay organized, aligned, and informed about scheduled and published marketing activities.

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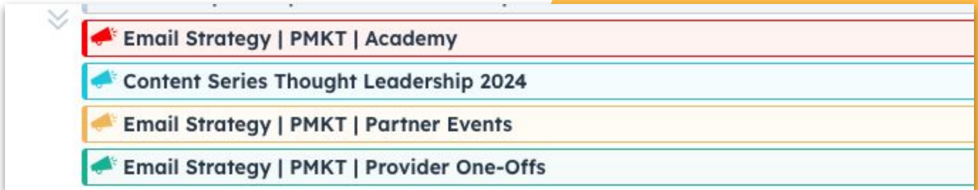
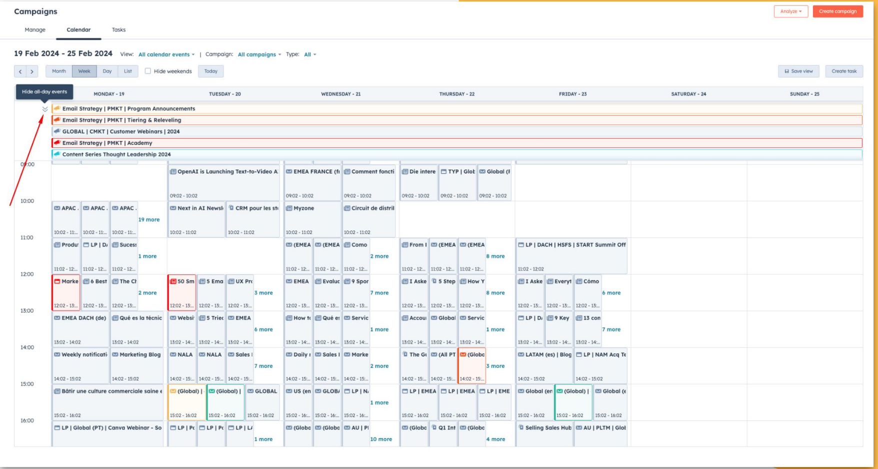
Launch region: Global





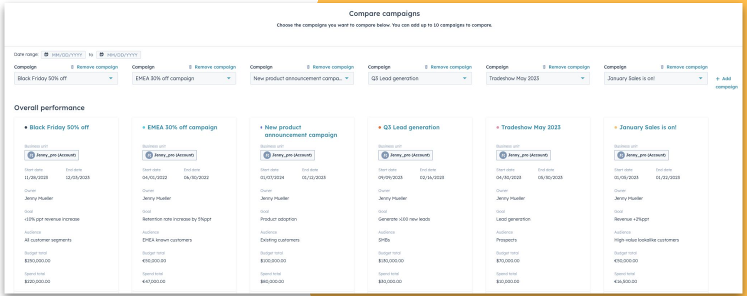
Marketing Hub™

Compare up to 10 Campaigns

You can now compare performance data for up to 10 campaigns to see which ones drive the most engagement. This functionality has recently been limited to a maximum of 5 campaigns

Performance data includes:

- Insights into default campaign properties
- Campaign metrics from your 'performance' tab including sessions, contacts, revenue, deals and asset metrics



Use Case

By being able to compare data from up to 10 campaigns at once, users can gain insights into which campaigns are driving the most engagement, leads, revenue, and deals. This can help users make data-driven decisions on optimizing their marketing strategies and allocating resources more effectively to campaigns that are performing well.

[Learn More](#)

Free Starter **Pro** **Ent** **Live**

Launch region: Global

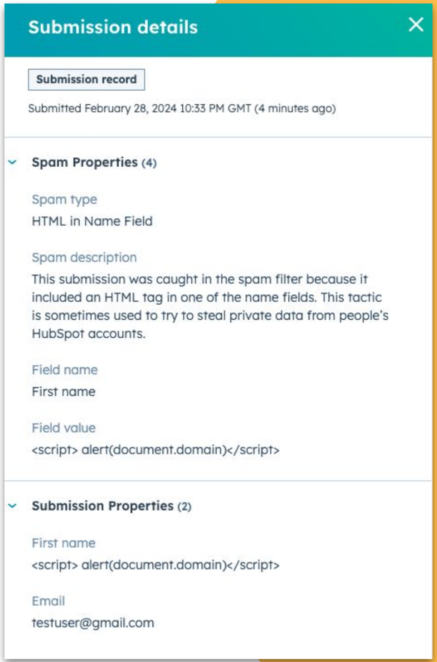
Marketing Hub™

Marking form submissions with HTML tags in contact name properties as spam

We are excited to announce an update to the Spam Submissions tool under Forms. Form Submissions that contain HTML tags in the first name or last name contact property will be considered spam and isolated under the Spam submissions tool in Forms.

Use Case

With this change, any incoming form submission that contains HTML tags in either the first name contact property or the last name contact property will be considered spam and will be isolated under the spam submissions tool.



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Launch region: Global

Marketing Hub™

New Journey Analytics Limits

Exciting news: We are raising the limits for numerous Journey Analytics features! Here's what we're rolling out to Enterprise customers in the coming week:

- The available date range for analyzing a Journey report is expanding from **three years** to **five years**
- The step limit per stage (a key component for breakdowns and branching) is expanding from **three steps** per stage to **five steps** per stage
- You will be able to apply **multiple report-wide property filters** to a Journey report; you could previously only use one property or list membership to filter out contacts or deals from the journey report
- You will be able to apply **multiple stage-level property filters** to a Journey report; you could previously only use one stage-level event property filter to a stage

Use Case

We are raising the limits for many existing Journey Analytics features to allow for richer, more complex analysis.

Learn More

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Launch region: Global

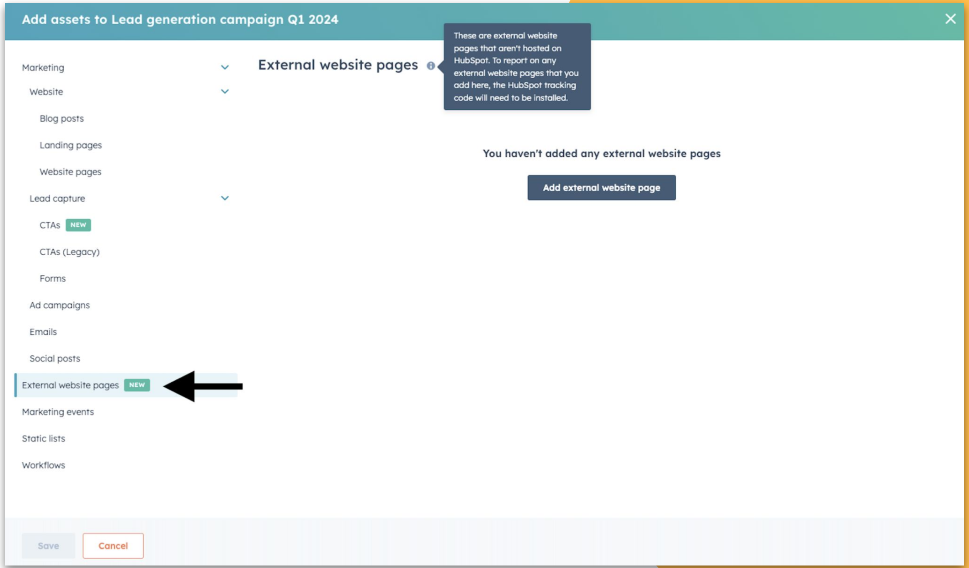
Marketing Hub™

Add 'External Website Pages' to your Campaigns

You can now add your first 'external' (non-HubSpot) asset type with a Campaign: external website pages. An external website page refers to any site not hosted on HubSpot. This new feature allows you to take your campaigns to the next level by adding both HubSpot and non-HubSpot assets.

Use Case

Provide marketers with a more comprehensive and integrated approach to managing and tracking their marketing assets across different platforms



Learn More

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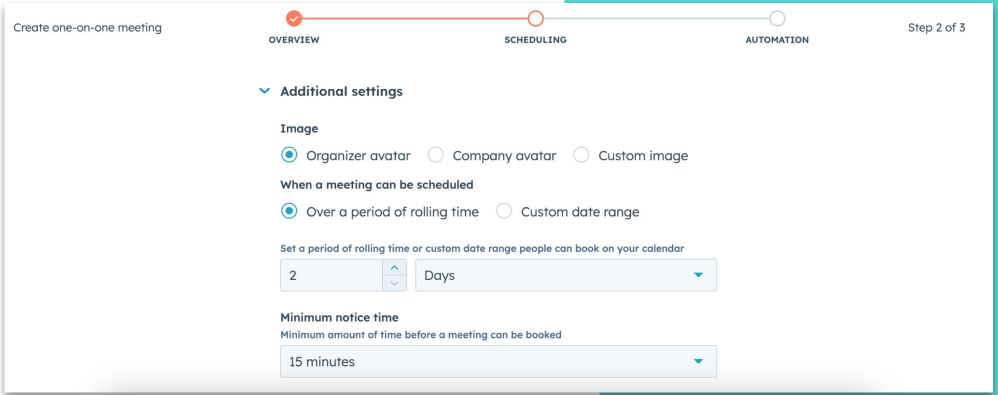
Launch region: Global

Sales Hub™ + Service Hub™

Sales Hub™

Additional Options for Rolling Availability in Scheduling Pages

Instead of only being able to limit attendees to booking meetings for "this week and next", you can now choose more specific dates when setting up meeting scheduling pages. This feature lets you set a certain number of days, business days, or weeks for people to book on your calendar.



Use Case

Users have been requesting for more specific scheduling options, so they can control how far in advance attendees can book meetings. This can help reduce the number of no-shows. It can be frustrating when someone books a meeting that won't happen for two weeks, especially if attendance is crucial. Now, users will have the ability to choose the time frame that suits them best.

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Launch region: Global

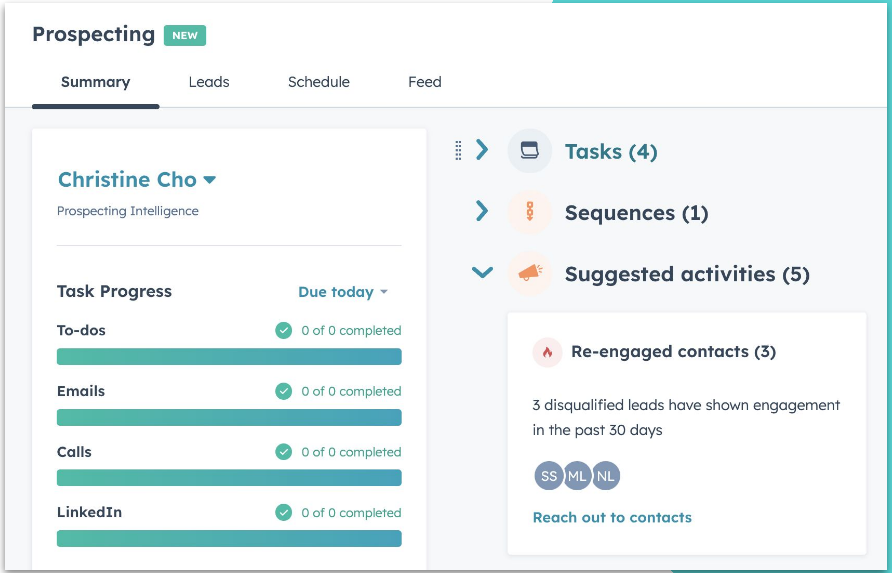
Sales Hub™

New Suggested Activity: Re-Engaged Contacts

In the prospecting workspace, sales reps can now see a list of contacts who have re-engaged after being disqualified.

Use Case

By surfacing contacts who have re-engaged through suggested activities in the prospecting workspace, we are making it easier for sales reps to get back in touch with those leads and keep track of all interactions in the CRM.



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Launch region: Global

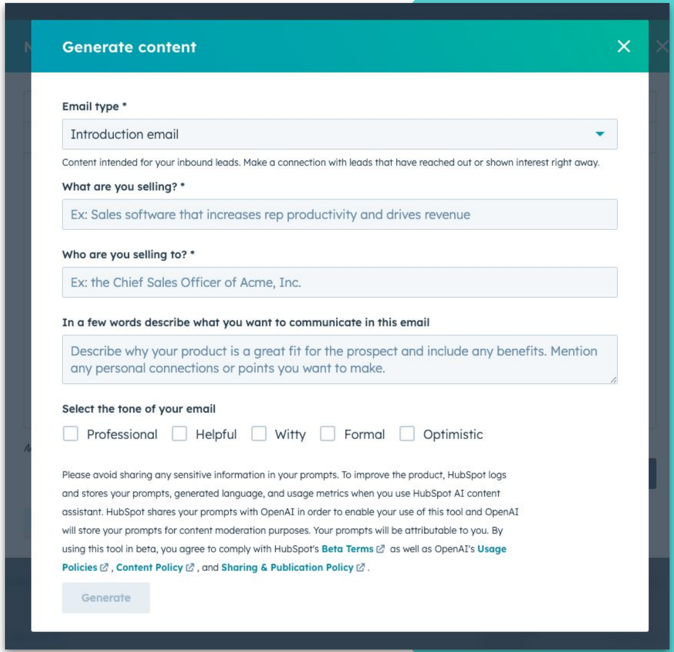
Sales Hub™

Generate new sales email templates with the assistance of AI

We are bringing the power of AI Assistant to the Templates tool! Teams can now generate new 1:1 email Templates that can be used across HubSpot in seconds.

Use Case

Writing new sales content is a time consuming task. Now content creators can use AI Assistant to draft sales Templates to use in 1:1 emails and Sequences in seconds.



Free | Starter | Pro | Ent | Public Beta

Launch region: Global

Sales Hub™

Deal Enhancements on iOS & Android

We're making it even easier to manage deals on the fly. Users can now:

- View color-coded deal tags on the deals board
- Receive push notifications on deals assigned and deal stage changes
- Get visibility of the active sort properties your board/list has been sorted by across deals, contacts, companies and tickets

Use Case

Deal tags help salespeople quickly find different deals. The color-coded tags make it easy to see which deals need attention, so salespeople can spend less time searching through the list.

Deal notifications about deal assignments or deal stage changes used to only be sent by email or on the desktop version of HubSpot. As salespeople are often on the go, they might miss these important notifications. The HubSpot mobile app now sends push notifications so salespeople can stay up-to-date even when they're not at their desks.

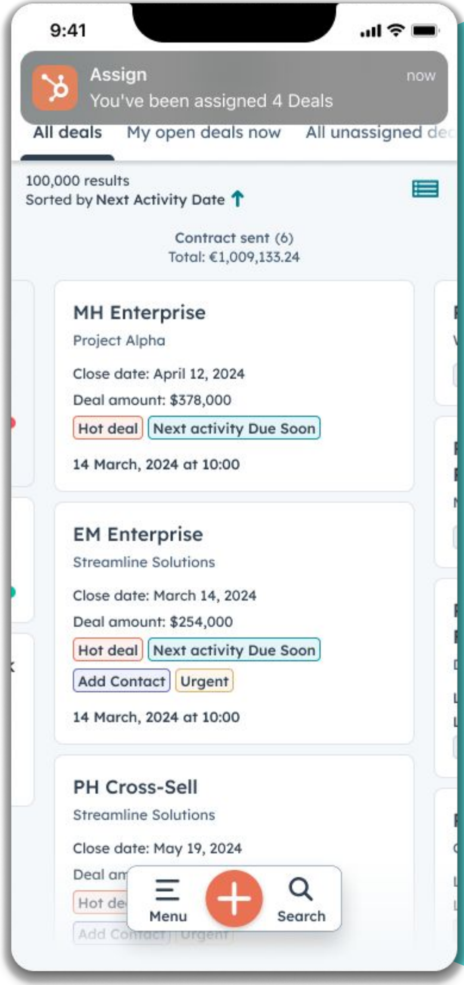
Sort properties had a big limitation: the sorted information didn't show the relevant details for each item. Now, sorting is visible for most properties, so salespeople can easily see the information they need to prioritize their work.

Free | Starter | Pro | Ent | Live

Launch region: Global

**Sales Hub Starter: Deal tags apply to all pipelines*
**Sales Hub Pro+: Deal tags can be applied to a specific pipeline*

***Deal Notifications & Display Sort Properties: available to all hubs & tiers*



Sales Hub™

Enhancements: Control editing access for specific deal stages

Super admins can now give editing access to deals in a "locked" stage to select users and teams. Previously, once a deal stage was set to restrict editing access, only super admins could edit deals in that stage. We've now expanded the permissions so a super admin can grant editing access to other users and teams when a deal stage is set to restricted access.

Use Case

This enhancement is designed to offer more flexibility and granularity in setting guardrails on your sales pipelines. This way, you can assign certain users and teams editing access, while still making deals in a specific stage read-only for all other users.

Learn More

Free Starter Pro Ent Live

Launch region: Global

Sales Hub™

Deal Split API

The new Deal Split API will enable customers to read and write deal splits with their respective percentages via API.

Use Case

In many businesses, deals are owned by multiple reps and the commission is split between the deal owners. It's important for teams to represent that shared deal ownership in HubSpot, including the percentage of commission each rep claims. Customers who are managing some of their deals or doing forecasting outside of HubSpot want to represent their deal split percentages accurately across all of their systems. Until now, it was not possible to read or write deal split data via API, leading to data that was incomplete and out of sync across their tech stack. With these changes, customers can have a single source of truth and ensure all of their deals data is accurately represented wherever it lives.

Learn More

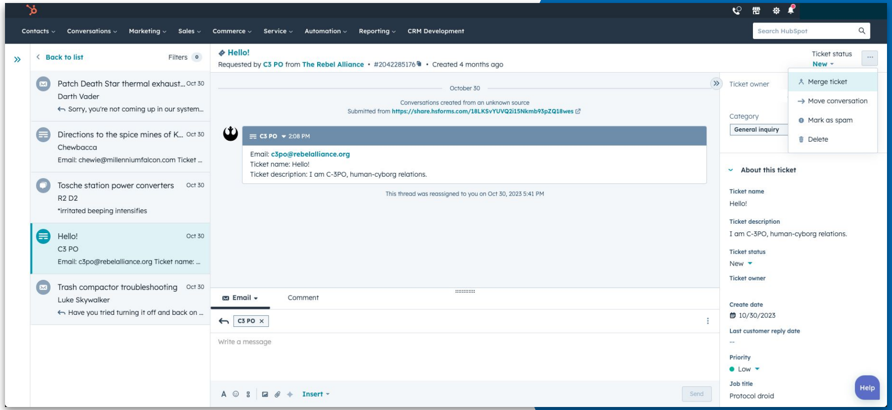
Free Starter Pro Ent Public Beta

Launch region: Global

Service Hub™

Ticket Merging in Help Desk

Users can now merge tickets in help desk. Help desk is all about empowering support teams to stay efficient and focused, with all the tools they need right in the same central workspace. Support reps no longer need to go back out to the CRM to merge duplicate tickets because we've brought that same functionality into help desk, with one big improvement: the ability to switch the primary ticket on the fly.



Use Case

Ticket merging is table-stakes functionality for any help desk tool. It is a key ticket action that allows reps to manage duplicates, keep track of their tickets, and maintain an organized workspace free of noise and clutter.

Learn More *Must be a Help Desk beta participant*

Free Starter Pro Ent Live

Launch region: Global

Service Hub™

Custom Feedback Surveys on Web

You can collect relevant feedback from website visitors of specific pages or based on query parameters.

The web surveys can also be triggered based on various conditions, such as:

- When visitors have spent a specific time duration on your page
- When visitors scroll beyond a certain % of the page
- When visitors appear to be leaving your website
- When the visitor has been inactive on your page for a specific duration

You can also choose how often the survey appears!

Use Case
Our customers need more flexibility to collect feedback from their website visitors and also target who they would like to collect the feedback from.

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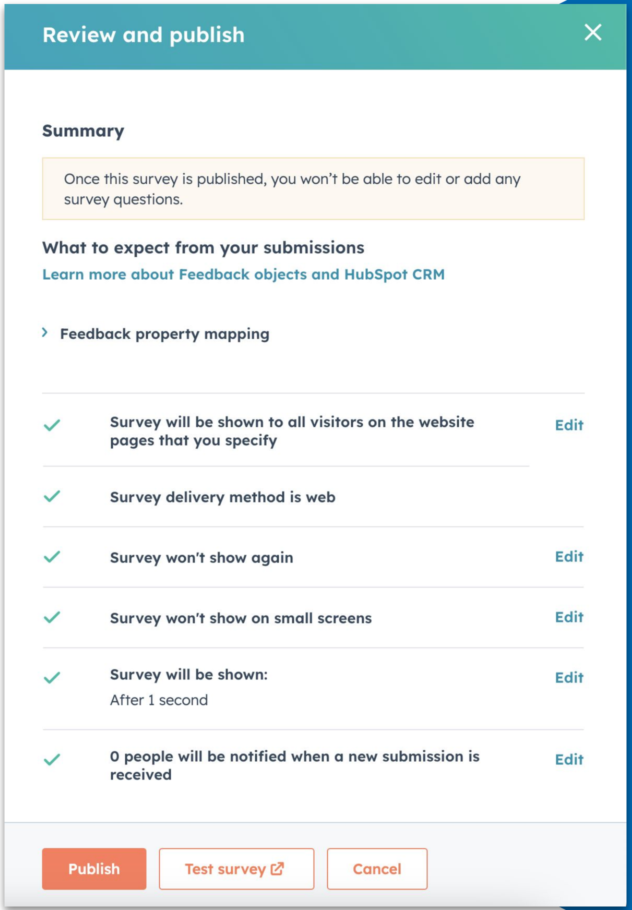

Service Hub™

Dependent fields in custom surveys

"Dependent Fields," helps you create personalized, dynamic surveys by customizing questions based on respondents' previous answers, providing a more engaging and insightful feedback collection experience.

Use Case

You can now collect feedback from customers with questions that are relevant to them and potentially increase the survey response rates.

Note: Dependent fields feature is available only in custom surveys and not available in standard surveys such as CSAT, NPS and CES.

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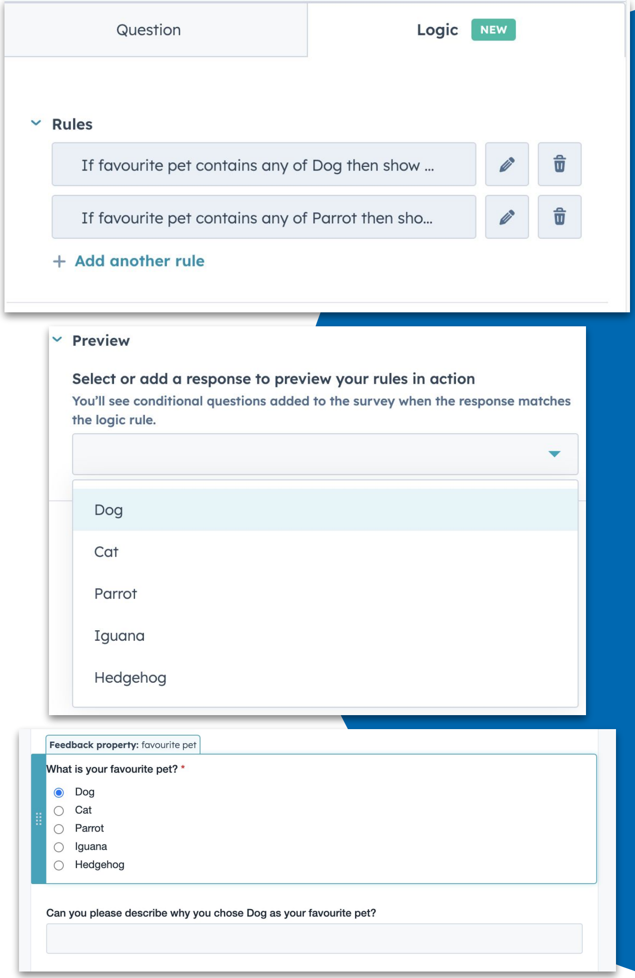
Launch region: Global



HubSpot

Service Hub™

Assigned Teams for Tickets

Customer support leaders and reps using tickets can more effectively manage their team's unassigned tickets with the new **Assigned Teams** ticket property. Tickets that are automatically assigned to Specific users and teams, but aren't successfully assigned to a user, will have the target teams added to the new **Assigned Teams** ticket property. Additionally, the target teams will receive a notification for the unassigned ticket.

Use Case

Enhance the management of unassigned tickets for customer support teams. By incorporating the Assigned Teams ticket property, teams can now easily identify unassigned tickets and take appropriate action to ensure timely responses, which ultimately leads to better customer satisfaction.

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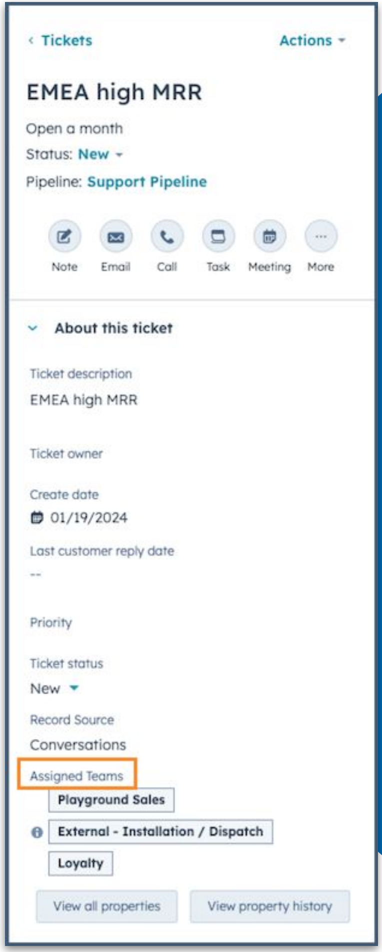
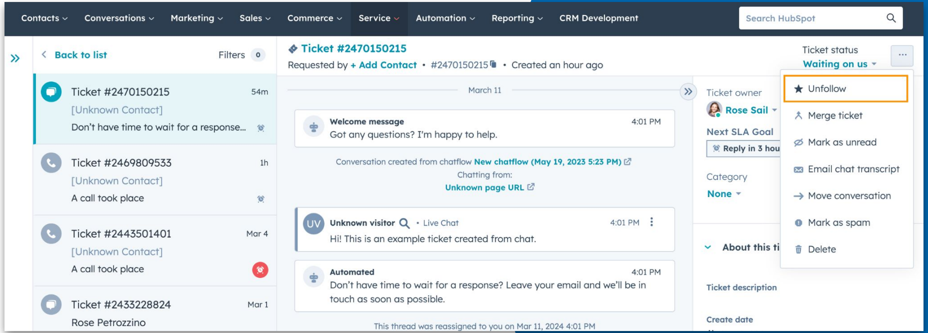


Service Hub™

Follow and Unfollow Tickets in Help Desk

You can now follow (or unfollow) tickets directly from help desk in order to receive notifications when there is new activity on the ticket!



Use Case

While this functionality was already available from the ticket record page, you couldn't follow or unfollow tickets directly from help desk. Having this functionality directly available in help desk will help support agents save time while ensuring they can easily stay up-to-date on important ticket changes.

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Launch region: Global

HubSpot

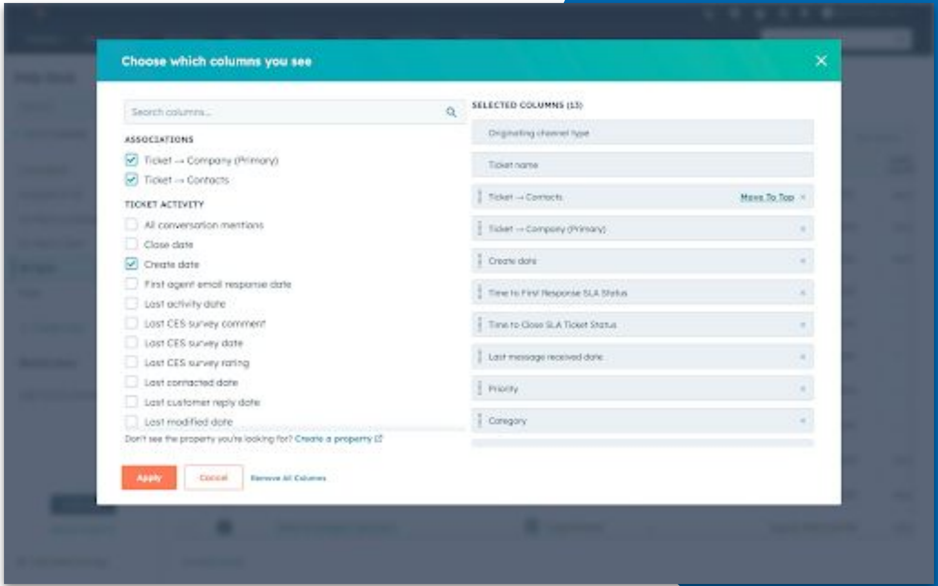
Service Hub™

Customizable Ticket List Columns

The help desk ticket list columns are now customizable! Choose from a menu of ticket properties and associations to control the information you see in a ticket list view.

Use Case

Support teams have unique preferences and requirements for the data they need to see in ticket lists. Customizable ticket list columns allow users to tailor the display of information to their portals' needs, ensuring they see the most relevant data at a glance.



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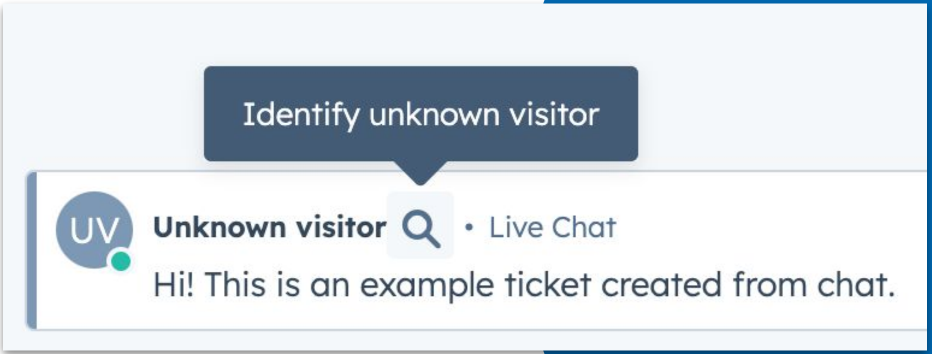
Launch region: Global

Service Hub™

Identify Live Chat Visitors in Help Desk

This change enables users to identify unknown visitors they are communicating with from within the new help desk workspace. Once identified, the messages within the communication thread will update to reflect the contact name, and the contact will automatically be associated with the support ticket.



Use Case

This change will allow users to identify chat visitors, making it easier for support agents to see who they're corresponding with. After a visitor has been identified, the next time that visitor chats in, their contact information will automatically appear (rather than "Unknown Visitor").

Free Starter **Pro** **Ent** **Live**

Launch region: Global

Service Hub™

Help Desk Sidebar Improvements & Customization

This set of changes unlocks new customization capabilities on the help desk sidebar, including the ability to create custom cards, remove and reorder cards, and create team-based sidebar views.

Use Case

This set of sidebar enhancements will help to ensure that support teams always have quick visibility into the information they need in order to solve customer issues efficiently and effectively.

**Must be a Help Desk beta participant*

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Launch region: Global

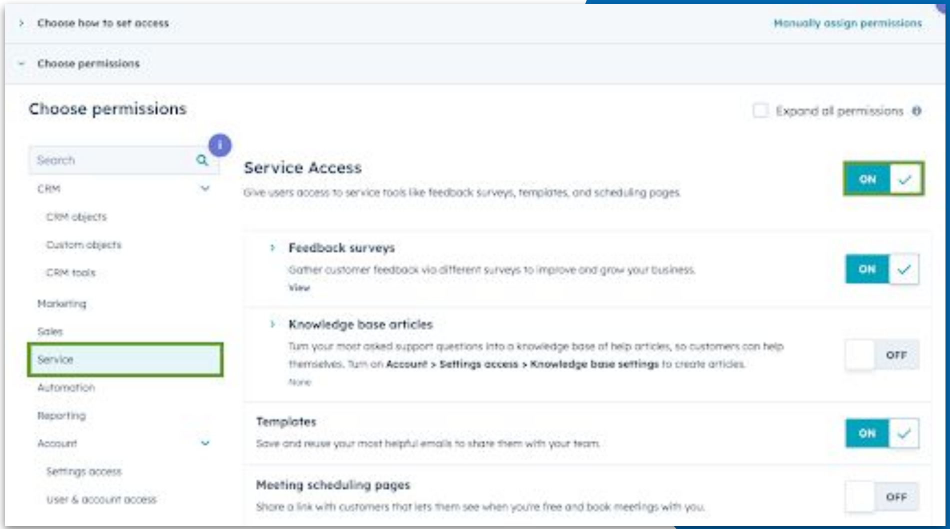
Service Hub™

Help Desk Access for Non-Service Users

Help desk ticket management is now unlocked for Service Pro and Enterprise users without a Service Seat!

Use Case

Sometimes, it takes a village to solve a customer's problem. Previously, only users with a Service Seat were able to access to the help desk. Now, with this change, anyone who's granted Sales or Service access will be able to view ticket information and collaborate in the help desk workspace.



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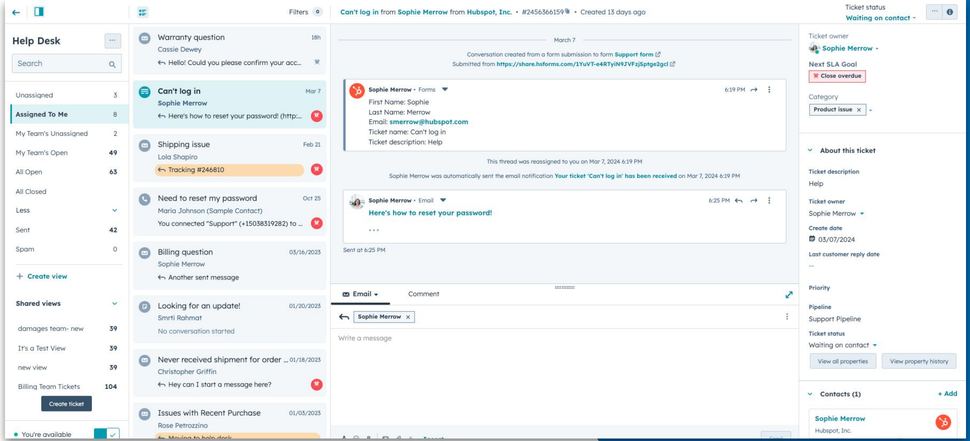
Launch region: Global

Service Hub™

Information Density Improvements in Help Desk

Help desk is getting a UI refresh to help users stay efficient and give them more flexibility over what elements to display in their workspace.



Use Case

The changes we're rolling out today will help support reps stay focused and efficient, with a familiar but streamlined interface that allows them to concentrate on what's important: their customers!

**Must be a Help Desk beta participant*

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Launch region: Global

Sales Hub™ + Service Hub™

Design update to booking meetings on behalf of other users in the CRM

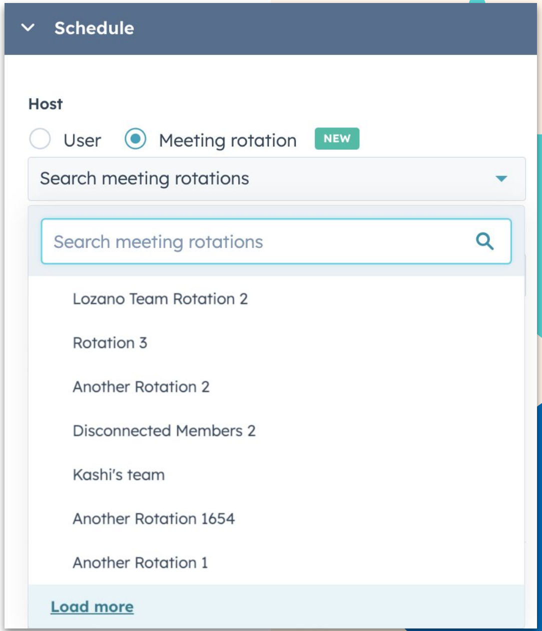
You will now be able to see all of your users and all of your meeting rotations by scrolling and using the "see more" option. You can also always search for the specific person or meeting rotation that you are looking for.

Booking for the same users or meeting rotations all the time?
We will now sort your most recently booked options to the top of the drop-down, making it more efficient to get the meeting booked!

Use Case
When booking meetings for others through a CRM record, you can now easily find and browse all of your users and all of your meeting rotations without needing to use the search function. For users that are frequently booking meetings for the same coworkers or using the same meeting rotations, we've made it so that your most recently booked users and rotations are sorted to the top of the list, saving you some time when locating the right person for the meeting.

Free Starter Pro Ent Public Beta

Launch region: Global



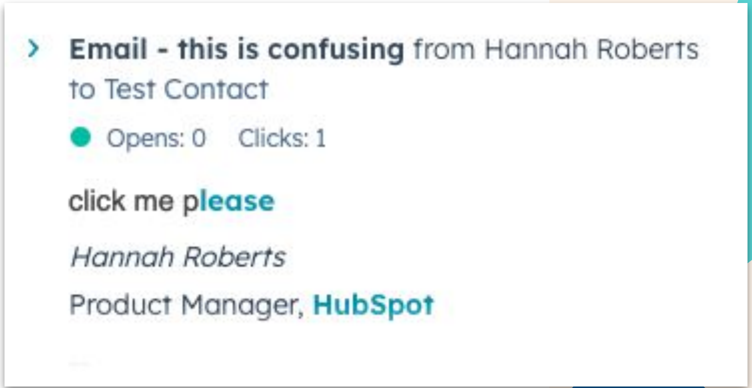
Sales Hub™ + Service Hub™

Implied opens for Sales and Service emails

If a sent email receives a click or reply, it implies the email was opened.

Use Case

Some email clients have configurations that prevent [HubSpot's open tracking pixel] from loading. If a recipient in this situation opens your email, there is no way for HubSpot to know. However, if the recipient clicks a link in the email or replies to it, then we can infer they opened the email.



Learn More

Free Starter Pro Ent Live

Launch region: Global

Sales Hub™ + Service Hub™

Deal Stage Calculated Properties

Professional or Enterprise customers will now have access to four (4) new HubSpot-defined deal properties, to track the progression of a deal as it moves through a sales pipeline:

1. Date entered {stage id}
2. Date exited {stage id}
3. Latest time in {stage id}
4. Cumulative time in {stage id}

Use Case

With access to these properties, you can easily identify bottlenecks in your sales process. For example, you can assess a deal pipeline's velocity by looking at the average "latest time" and "cumulative time" of each deal stage.

Learn More

Free Starter **Pro** **Ent** **Live**

Launch region: Global

Sales Hub™ + Service Hub™

Compare Forecast Submission Accuracy to AI Forecast Accuracy

Now customers will see a forecast submission column in the Forecast Accuracy Over Time table of the Analyze tab to help them understand how their company's manual forecast accuracy compares to their AI forecast accuracy. The new calculation averages the manual submissions in a given month for each team or rep and sums them up.

Use Case

This feature will help sales leaders who are calibrating forecast projections for their business. By surfacing the accuracy of their teams' average manual forecast submissions compared to what they actually closed that month, sales leaders will develop a good sense of how manual forecasts skew and can identify opportunity areas for additional coaching with the goal of improving team-wide manual accuracy over time.

Forecast accuracy over time

Date range: Last 6 months

MONTH	CLOSED WON	FORECAST SUBMISSION	AI FORECAST AVERAGE
March 2024	$500,000.00	$500,000.00	–
February 2024	$600,000.00	$390,000.00 65%	$530,000.00 88%
January 2024	$630,000.00	$429,000.00 68%	$522,333.33 83%
December 2023	$715,000.00	$500,000.00 70%	$677,333.33 95%
November 2023	$525,000.00	$375,000.00 71%	$445,666.67 85%
October 2023	$475,000.00	$275,000.00 58%	$438,666.67 92%

Free Starter Pro Ent Public Beta

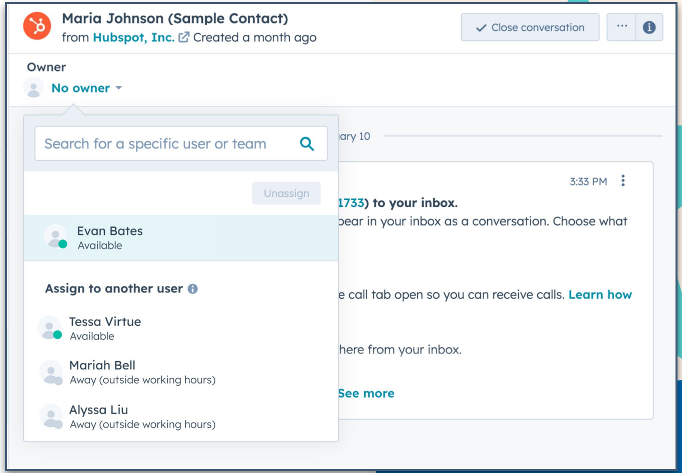
Launch region: Global

Sales Hub™ + Service Hub™

User Working Hours for Inbox and Help Desk

With user working hours, Admins and individual users can set weekly working hours based on the user's time zone, which might vary from the account's or their team's time zones. When a user is outside of their working hours, their availability will be changed to Away and they won't be eligible for automatic assignment in inboxes or Help desk.

Users can manually change their availability status on the user record page, inbox, or Help desk and the new status will be mirrored across all the experiences.



Use Case

Users don't expect to be assigned conversations or tickets outside of their working hours, especially with globally distributed teams who might work across many time zones. With user working hours, users and Admins can drive better customer outcomes and improve employee retention.

Free Starter Pro Ent Live

Launch region: Global

Sales Hub™ + Service Hub™

Simultaneous Ring for up to 100 Agents

Calling Channels in the Inbox and Help Desk now support ringing up to 100 agents simultaneously.

Use Case

Calling is one of the newest channel types available in Inbox and Help Desk. Previously, inbound calls would only ring 10 reps at a time. This update expands that number to 100, supporting larger team sizes and higher call volumes.

Please note:

- Your device ringing should be set to Ring in HubSpot to receive inbound calls in the HubSpot browser.
- After a user has been assigned to a number connected to a calling channel, they must visit the Help Desk or Inbox at least once to be able to receive calls in that channel.
- The call window must remain open to receive inbound calls.

Free Starter **Pro** **Ent** **Live**

Launch region: Global

Operations Hub™

Operations Hub™

Proactive alerts for new duplicate records

Introducing the ability to configure proactive alerts for new duplicate records!

Use Case

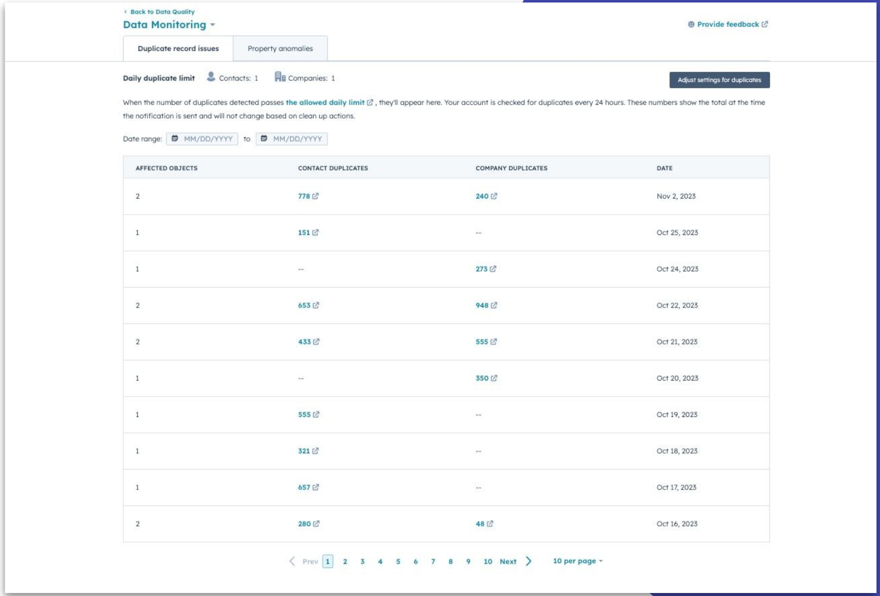
As your business grows, so does the amount of data in your CRM. Managing and cleaning that data should be easy, intuitive, and, ideally, something that your CRM platform helps out with!

In the past, users have had to check for new duplicate records in-app. Not anymore! Notifications can now be configured through the data quality command center, and are sent whenever new duplicates are detected. Alerts can be viewed in-app, and then easily actioned from within the duplicate manager.

[Learn More]

Free Starter **Pro** **Ent** **Live**

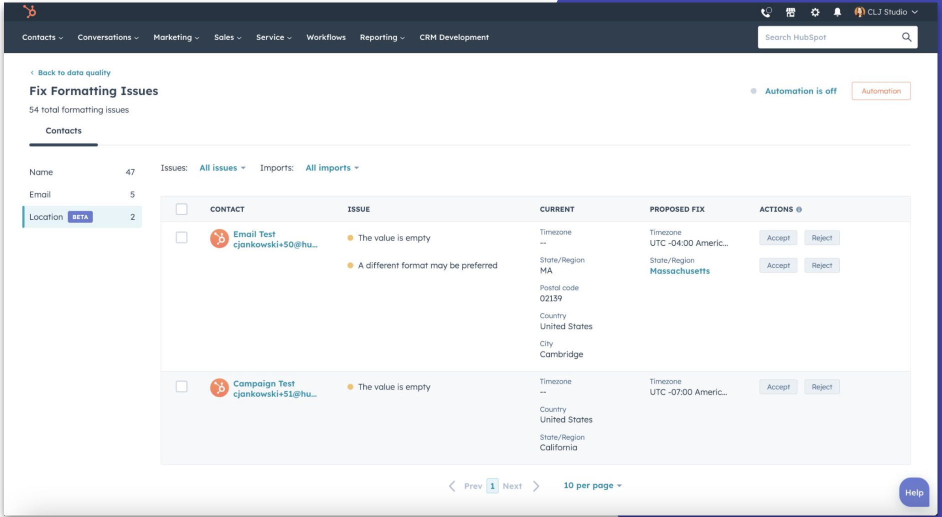
Launch region: Global



Operations Hub™

HubSpot AI Location Formatting Suggestions for Contacts

HubSpot AI searches for contacts with missing data or mismatches in location properties like Country, ZIP/postal Code and provides clean-up suggestions.



Use Case

Location data (country, state/region, ZIP/postal code, time zone) comes into the CRM in a variety of formats - full-length, abbreviated, etc.. Without standardization on these fields, it can be difficult to create reports, lists, or trigger automation. With this feature, HubSpot AI automatically suggests the correct format for your business to make it easy to detect, review, and resolve potential issues.

Learn More

Free Starter Pro Ent Live

Launch region: Global

PULSE CHECK

Survey Link

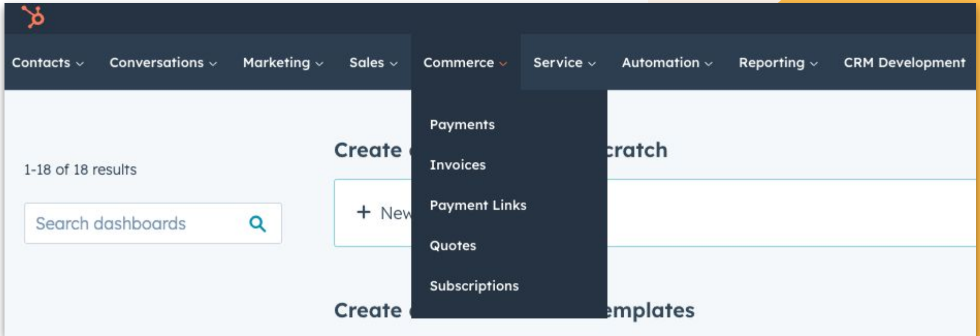
Commerce Hub™

Commerce Hub™

Commerce in the Global top-level navigation

HubSpot's Commerce Hub contains easy-to-use tools to help your business bill customers and collect revenue. These tools are now under a new top-level global navigation entry:

- Payments
- Invoices
- Payment Links
- Quotes
- Subscriptions



Use Case

There is a new top-level global navigation entry (Commerce) that lists the tools that are used to collect payments. These tools are part of HubSpot's new Commerce Hub offering. These tools were formerly under the "Sales" top-level global navigation.

Free Starter Pro Ent Live

Launch region: Global

Commerce Hub™

Stripe Payment Processing: Local Payment Method Support: SEPA

A SEPA – or Single Euro Payments Area – bank transfer lets customers send and receive cross-border payments in euros.

Use Case

With this launch, customers in the Eurozone can use local bank transfers through SEPA in addition to Euro Credit Cards. With SEPA, customers can reduce their payment processing costs significantly and can offer their buyers the most preferred way of making payments.

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Launch region: Global

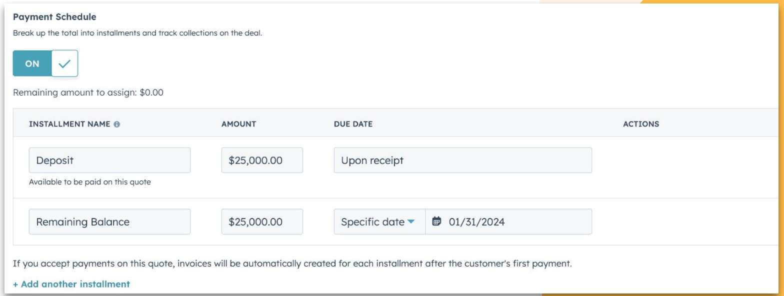
Commerce Hub™

Payment Schedules on Quotes

Commerce Hub users can now have Invoices automatically created for the payment schedules on their Quotes.

Use Case

Payment schedules enable companies to de-risk their business and ensure more stable cashflow for project based work.



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Launch region: Global

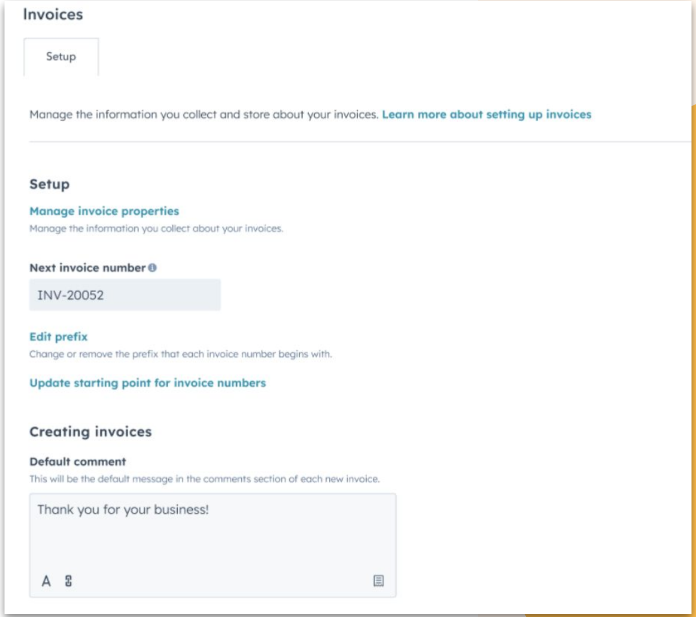
Commerce Hub™

Default Comments on Invoices

Users have the option to add a default comment that appears on every new invoice created.

Use Case

When a merchant wants to include the same message on every invoice they send out (for example, "Make checks out to..." payment instructions).



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Launch region: Global

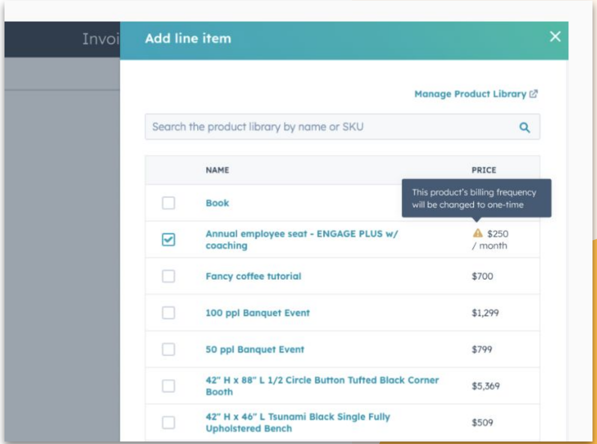
Commerce Hub™

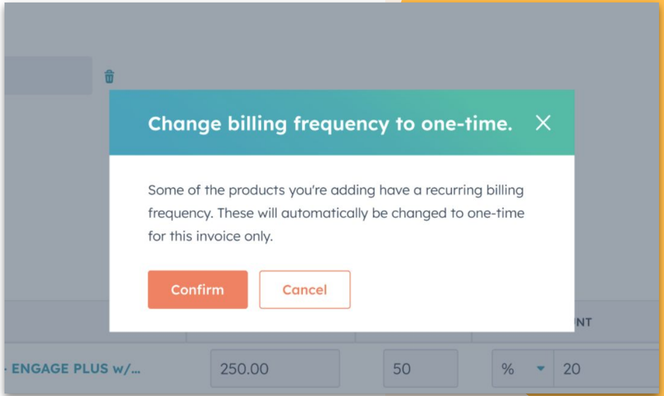
Add Recurring Products to Invoices as One-Time Items

Users can now add recurring products (products with a recurring billing frequency) from their product library to their invoices, as one-time items. This gives merchants more flexibility when building their invoices, as it enables them to bill their customers for more products from their product library.

Use Case

A user may have a product in their product library such as a "consultation" that has a monthly recurring billing frequency, but wants to bill their customer for just one month of consultation. Now, they create an invoice with the consultation product added as a one-time line item.





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Launch region: Global

Commerce Hub™

Pre-Enrollment Invoices

Previously, users could not create invoices without first enrolling in Commerce Hub and enabling HubSpot payments. We are removing that requirement, so users can now finalize, send, and manually record payments on invoices without being enrolled.

This way, users can start using invoices and getting value sooner. They can choose to set up Payments later in order to speed up with payments collection process.

Use Case
Merchants can use HubSpot for their invoicing needs, and get all their revenue data into HubSpot, prior to being ready to use HubSpot for collecting payments.

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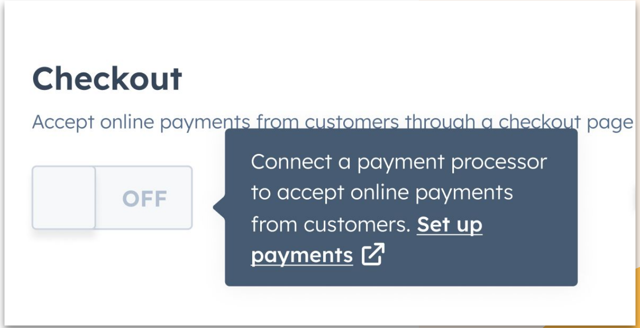
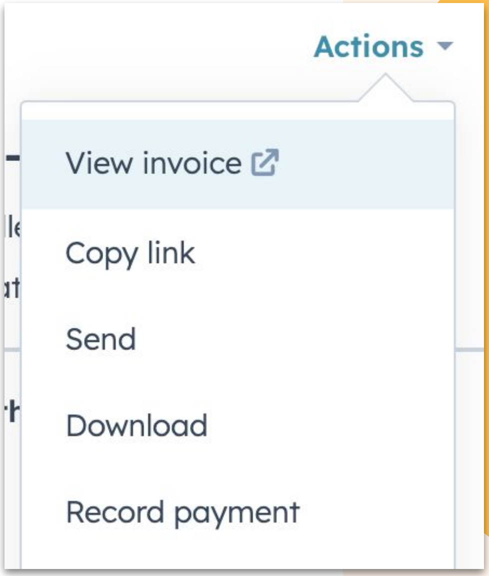
Launch region: Global





Commerce Hub™

Read-only public API for Commerce Hub Invoices, Subscriptions, and Payments

A new read-only public API is now available for the core Commerce Hub objects: Invoices, Subscriptions, and Payments.

Use Case

You can now utilize the HubSpot API to build custom apps and integrations that leverage Commerce Hub data. Previously, no public API support was available.

Now, a read-only API is available to programmatically query and retrieve Commerce Hub data from Invoices, Subscriptions, and Payments. With this new API support, you can query for a client's open invoices to display in another application, or retrieve a client's payment history so that data can be synced to an external system.

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Launch region: Global

Commerce Hub™

Japanese Yen (¥JPY) support for Commerce Hub

Customers that sell in the Japanese Yen (¥JPY) can now send quotes, invoices, and payment links in Yen.

Use Case

We know how important it is for both sellers and buyers to transact in their local currency, so we're continuing to add additional currencies to Commerce Hub.

Free Starter Pro Ent Live

Launch region: Global

Commerce Hub™

Display Multiple Tax IDs on Invoices

You can now display multiple tax IDs on an invoice.

Use Case

There may be instances when an invoice requires multiple tax IDs to be listed.

Free Starter Pro Ent Live

Launch region: Global

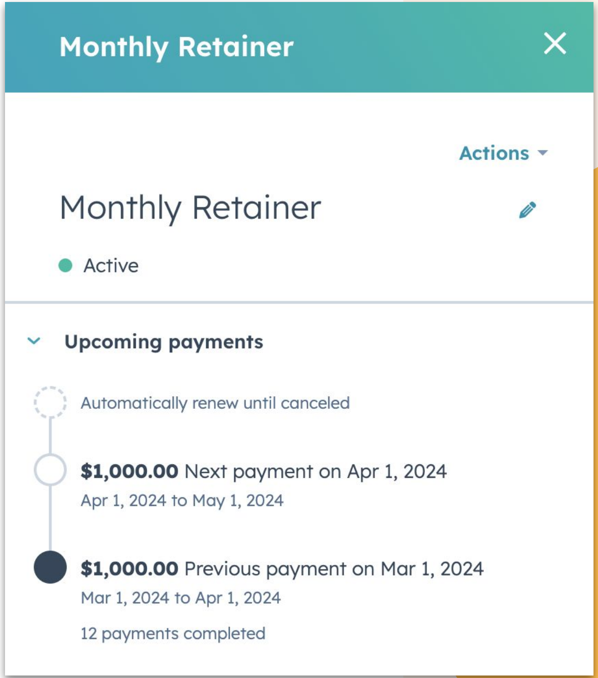
Commerce Hub™

Subscription Timeline Card

Commerce Hub customers can now see more detail about the timeline of each subscription. Customers can clearly understand what has been paid and what will be paid in the future.

Use Case

Commerce Hub customers use Subscriptions to manage their recurring billing and payments. Subscriptions can have a fixed number of billing periods or can auto-renew until cancelled. When a business is using subscriptions to manage their recurring billing, it's important for the entire front office to have a clear understanding of each subscription and when it will bill next.



Free | Starter | Pro | Ent | Live

Launch region: Global

CRM Platform

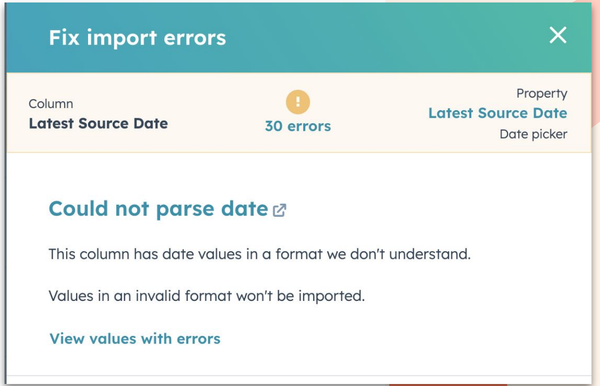
CRM Platform

Import Preview Validation Now Checks the First 1000 Rows of your Import

We will now scan the first 1000 rows of your import files for potential errors.

Use Case

Now that we've expanded to 1000 rows of preview validation, we're getting ever closer to checking for errors across every single row of every single import into the CRM. This will help ensure that you're able to resolve errors in your data before writing it to the CRM. It also means that features like our new invalid enum remapping tool are even more powerful, as we check for misspelled enumeration options across more rows of your file.



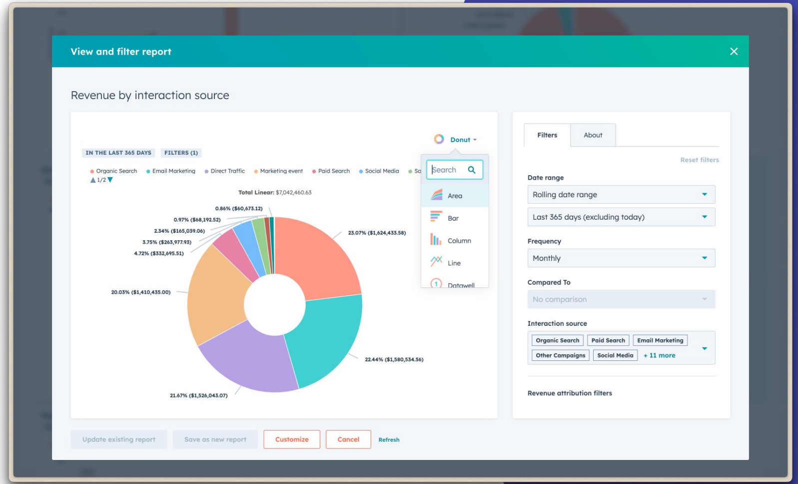
Free Starter Pro Ent Live

Launch region: Global

Operations Hub™

Report Visualization Quick Change

Now you can make quick changes to your report, directly in the Single Report View, saving time and making it easier to understand your data. This way you can change between different views to see what's the best way to showcase your data - it could be a bar chart, a line graph, or even a table.



Use Case

Empower HubSpot users to quickly and easily customize the visualization of their reports in the Single Report View.

Free Starter Pro Ent Live

Launch region: Global

HubSpot

Operations Hub™

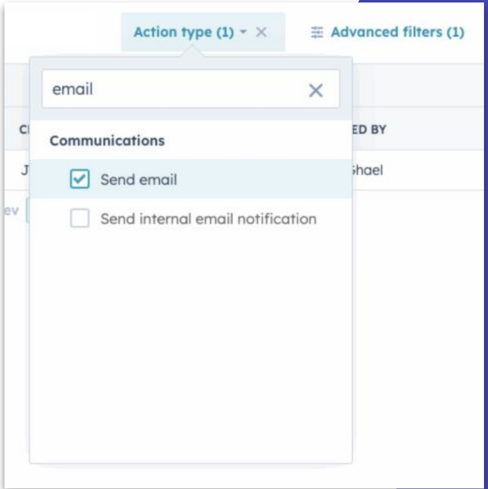
Find Workflows by Action Type

Customers can now quickly and easily identify workflows that use specific action types. The table that lists Workflows now contains a new column and a new quick filter for "Action types".

Use Case

Understanding what's happening within individual workflows is an important part of managing automation at scale. Until now, customers have captured that information with workflow names and descriptions.

The new "Action types" filter and column adds a new layer of data and helps improve workflow management by allowing customers to filter workflows by their actions.



Free Starter Pro Ent Live

Launch region: Global

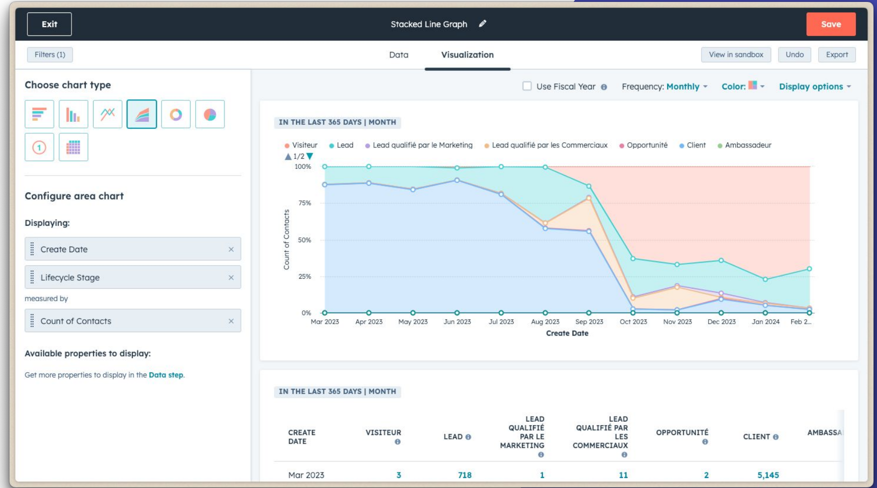
Operations Hub™

100% Stacked Charts

You can now change Bar, Column, Line, and Area to Percent Stacking, making it easy to see changes in proportions over time.

Use Case

With 100% Stacked Charts, you can effortlessly answer questions like "What proportion of our views are coming from each source?", or "What percentage of the total pipeline does each stage make up?". These charts offer a visual breakdown of each segment's contribution to the total, making it easy to compare proportions across different categories or over time.



Free Starter **Pro** **Ent** **Live**

Launch region: Global

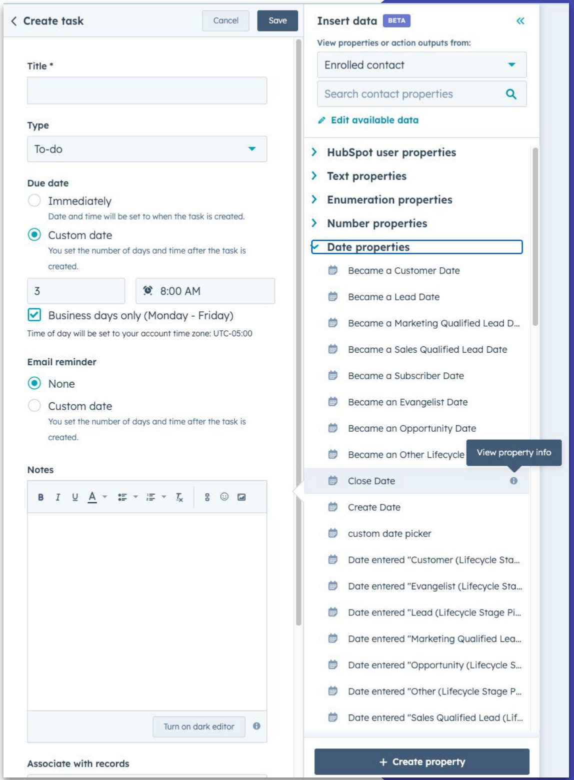
Operations Hub™

Updated Data Organization in Workflows

We've updated the workflow data panel to organize properties and data sources more intuitively.

Use Case

We've updated how we organize properties and data within the panel so that it's easier to see all available options and easier to find the right properties for the task at hand. Properties are categorized by type, and can be easily narrowed down via a dropdown field. We've also made it easier to view the details of any property and even create new properties on the fly - all without ever needing to leave the workflows app!



Free Starter Pro Ent Live

Launch region: Global

Operations Hub™

Setting to automatically turn off a workflow

Workflows now have a setting that lets you set a date for your workflow to turn off automatically, bringing more control and peace of mind to your automated processes.

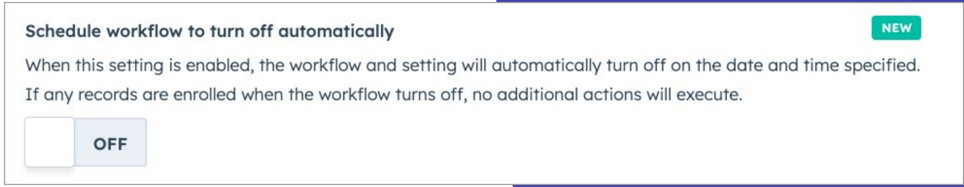
Use Case

Workflows are intended to take manual tasks off your plate. But many automation users find themselves setting up reminders to manually go back into HubSpot on a day in the future to turn off a workflow that should only run for a specific period of time, like during a promotion. Turning unneeded workflows off when they're no longer useful ensures that unwanted updates or communications don't occur. We've now implemented a setting that can do this for you automatically, removing the need for that extra monitoring and manual effort.

Learn More

Free Starter **Pro** **Ent** **Public Beta**

Launch region: Global



Operations Hub™

Daily Workflow Enrollment Change Notifications

Customers can now receive daily email notifications for workflow enrollment changes.

Use Case

Today, managing and reporting on workflows requires manually checking individual workflows, or waiting to receive a weekly email on Fridays. With this change, users can receive daily email notifications to monitor workflow enrollment trends over the last 7 days that are not within the user-defined change thresholds users have defined. This will allow users to proactively receive daily updates on workflow performance, and identify potentially problematic changes without manually checking. From the email notification, users can go into any of the workflows to take action as needed.

Learn More

Free Starter Pro **Ent** **Live**

Launch region: Global

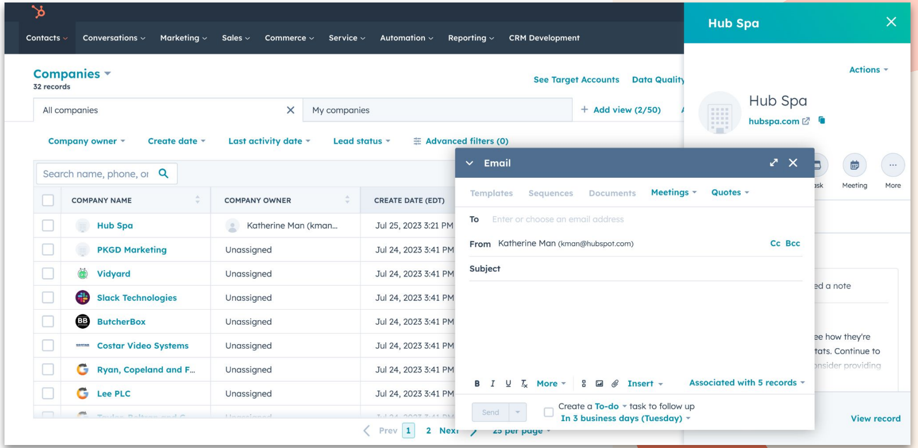
CRM Platform

Create Activities from Preview Sidebar

Users can now create activities from the preview sidebar on multiple pages outside of the record including index, board, and lists. Instead of opening multiple tabs with individual records, users can create an activity from the preview sidebar within the context of their work. This keeps them working efficiently and effectively out of one place.

Use Case

Create any activity from the preview sidebar so users can stay within the context of their work



[Learn More]

Free Starter Pro Ent Live

Launch region: Global

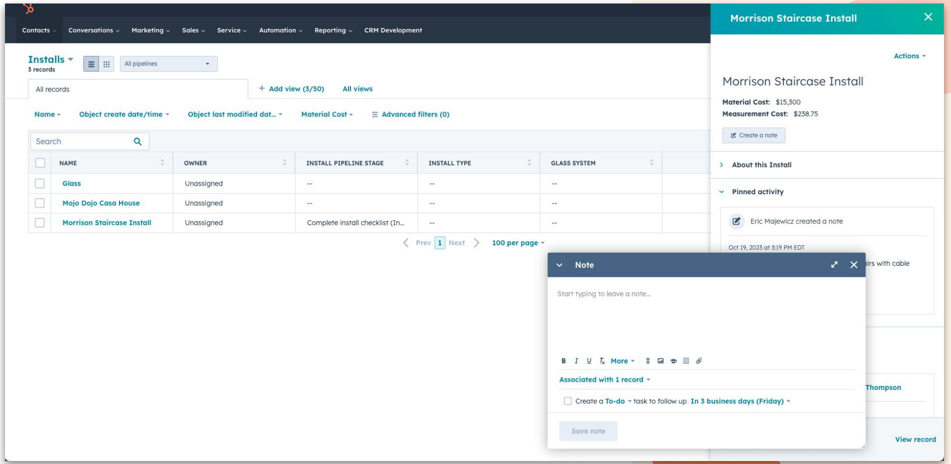
CRM Platform

Create Notes from Preview Sidebars

You can now create notes from the preview sidebar on multiple pages outside of the record including index, board, lists, and deal forecasting.

Use Case

Instead of opening multiple tabs with individual records, you can create a note from the preview sidebar within the context of your work. This keeps you working efficiently and effectively out of one place.



Free Starter Pro Ent Live

Launch region: Global

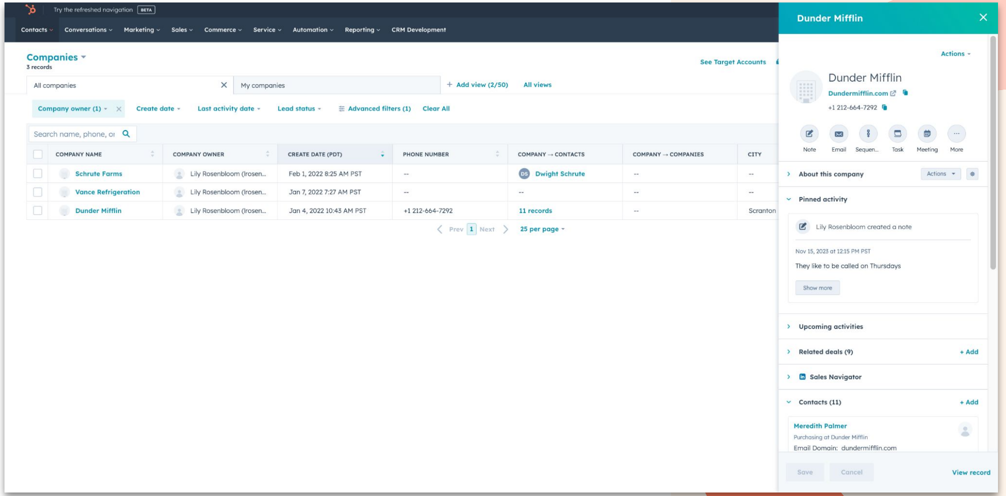
CRM Platform

Preview Sidebar Customization

Preview sidebar customization gives admins the ability to create customized views for the preview sidebar by object type and by team.

Use Case

Through preview sidebar customization admins can provide their teams with the right information at the right time, helping them be more efficient, effective, and deliver a better experience for their customers.



[Learn More]

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Launch region: Global

HubSpot

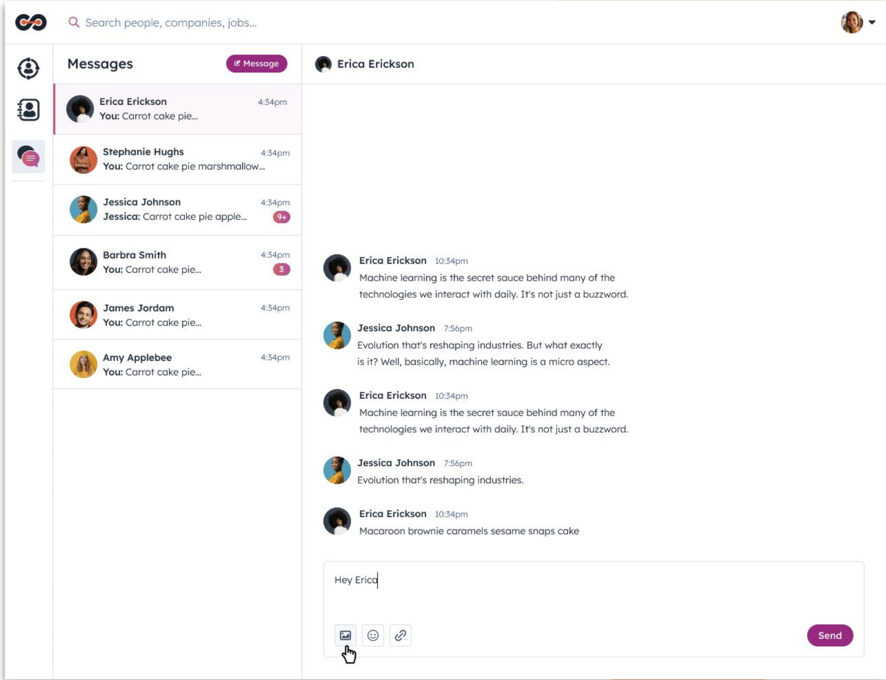
CRM Platform

Connect.com Direct Messaging

Introducing Direct Messaging, a simple, private, and frictionless 1:1 messaging experience, enabling Connect.com members to connect on a deeper level than they can in publicly accessible communities.

Use Case

Our users don't always want to converse with other Connect.com members in public within our communities. They often want to continue a conversation on a deeper level in a private 1:1 setting. Until now, this has not been possible on Connect.com with users often turning to email or other social networks to chat privately. With our goal of creating authentic, and meaningful connections on Connect.com, this has been a huge feature gap.



Free | Starter | Pro | Ent | Live

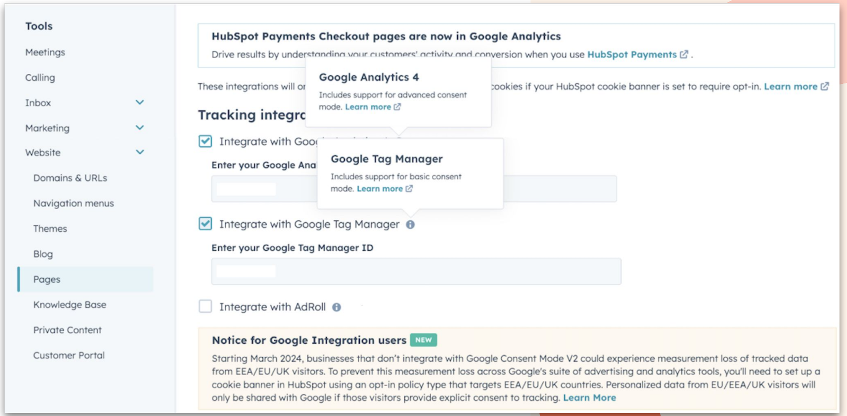
Launch region: Global

CRM Platform

Support for Google Consent Mode V2

HubSpot's Google Tag Manager and Google Analytics integrations now support Google's new Consent Mode when using the HubSpot cookie banner.

As of the March 2024 policy update set by Google, business advertising to EEA/EU/UK visitors must use a strong framework to collect and communicate end-users' consent choices with Consent Mode. Otherwise, websites could experience measurement loss of Google Ad campaigns.



Use Case

Google Consent Mode allows you to adjust how your Google tags behave based on the consent status of your website visitors. When the visitor consents, Google will observe data as normal.

Learn More

Free Starter Pro Ent Live

Launch region: Global

CRM Platform

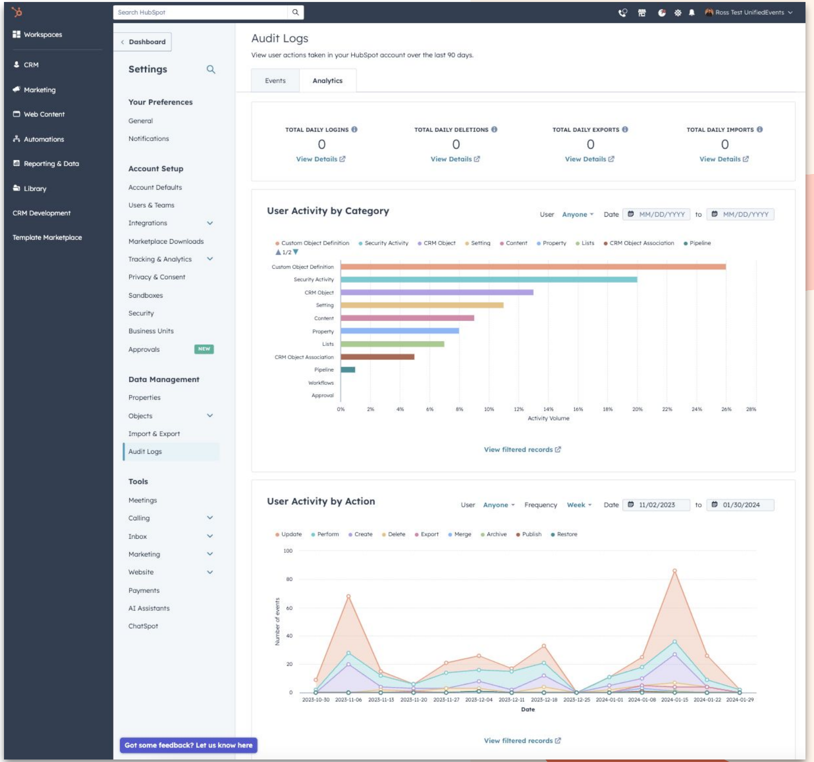
New Analytics Tab for User Activity

A new analytics tab for contextual, high-level insights on user activity within the Audit Log page of your HubSpot account.

Use Case

The analytics tab sits alongside the audit log and it aims to provide high-level insight into user activity. You can view areas of the account users are working within and what changes are being made.

Please note: the audit log is not comprehensive of all user actions and is not indicative of all user activity. For example, the audit log does not include activities such as 1:1 emails, calls, and notes which are available through Sales reports. If there is information not currently shown that you would find valuable, please use the feedback button at the bottom of the audit log page which comes directly to the team.



Free Starter Pro **Ent** **Public Beta**

Launch region: Global

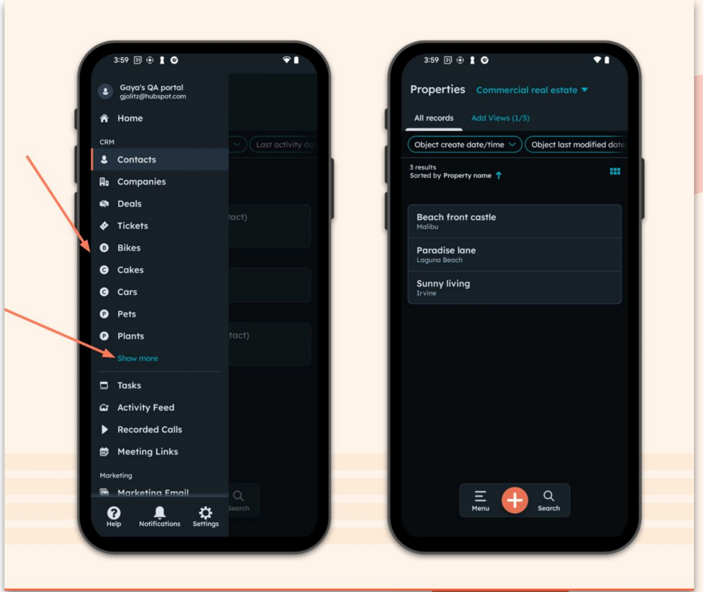
HubSpot

CRM Platform

Mobile Navigation Improvements for Custom Objects on Android

We've made several improvements to how users interact with Custom objects on mobile:

- Custom objects are now displayed in the global menu alongside other standard object types
- Users can now filter and sort custom objects by all properties (just like any other object)
- Users can add up to 5 saved views for custom objects
- Custom objects with pipelines can be viewed in board mode



Use Case

We're now putting custom objects in the main menu and adding filtering, sorting, saved views, and a board options that go a long way in making sure custom objects are treated the same as other objects in the mobile app.

Free Starter Pro **Ent** **Live**

Launch region: Global

CRM Platform

New Detail Properties on all Records

We recently introduced a new “record source” property highlighting how a record was created. This release is introducing new “detail” properties enabling you to further filter records on a more granular level and see additional context.

Use Case

Provide users with more granular information about how records were created, allowing for better filtering and segmentation of data.

NAME	EMAIL	RECORD SOURCE	RECORD SOURCE DETAIL 1
President Barbie	persident@barbie.com	Import	Barbie Contacts - Sheet1 (1)....
Ken	ken@barbie.com	Import	Barbie Contacts - Sheet1 (1)....
Stereoty...	stereotypical@barbie.com	Import	Barbie Contacts - Sheet1 (1)....
Allan	allan@barbie.com	Import	Barbie Contacts - Sheet1 (1)....
Sasha	sasha@realworld.com	Import	Barbie Contacts - Sheet1 (1)....
Weird Barbie	weird@barbie.com	Import	Barbie Contacts - Sheet1 (1)....

Learn More

Free Starter Pro Ent Live

Launch region: Global

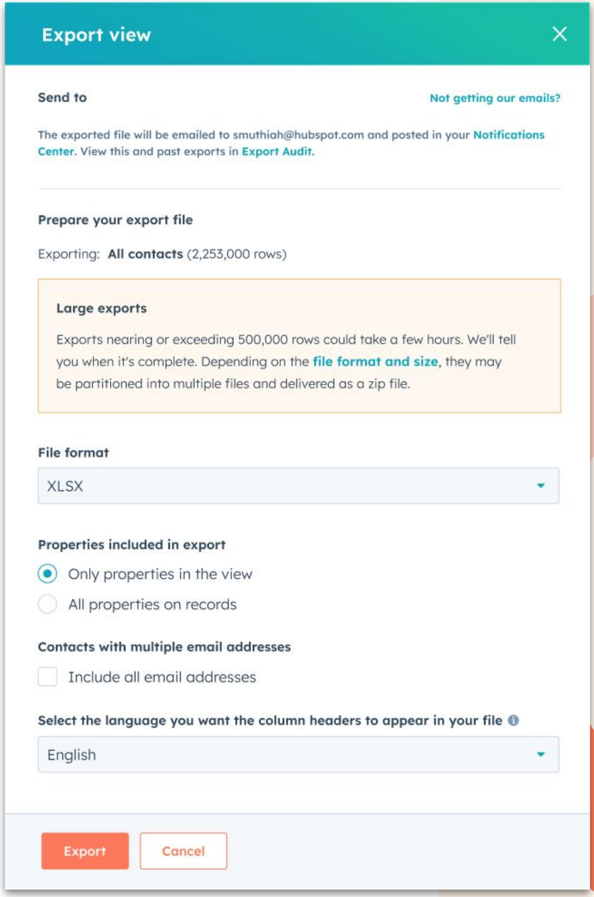
CRM Platform

Better Handling for Large Exports

We'll now deliver exceptionally large exports in multiple files within a .zip file to speed up delivery of this data. Previously, these exports could have taken days, or even failed without being executed.

Use Case

Before this change, particularly large exports could take days to process. In many cases, they would silently fail and never deliver the exported files to customers. Depending on the file type chosen, customers could also see their data cutoff based on Excel's limits. With this change, customers can more reliably export their data out of the CRM, without having to wait long for larger exports to execute.



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Security Center Access Permission

The Security Center access permission allows a user to grant access to all security-related settings and insights in our Security settings tools. By giving a user the new Security Center access permission, they can get access to the account's security posture insights, in the Security Health Check, as well as the ability to modify security settings, create distinct permission from the existing Account Defaults permission, and reduce unnecessary access to security settings we grant today.

Use Case

The Security Health Check contains new permission checks to make sure that security admins can only action health check insights if they have the necessary permissions to do so.

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CRM Platform

Invalid Enum Remapping In Import Now Support Multi-Checkbox Properties

Last year, we launched invalid enum remapping -- allowing users to remap incorrectly entered dropdown select enumeration options in their import files to the correct options in HubSpot. Now, we're expanding this functionality to also support multi-checkbox properties.

Use Case

Remapping has had a huge impact on the prevalence of invalid enumeration option error in import. Upon launch, the error was reduced nearly in half, and we're still seeing that weekly occurrences of the error post-import are much lower than prior to launch.

Expanding this functionality to multi-checkbox properties increases the impact this feature has for our customers, bringing us closer to a world with zero invalid enumeration option errors in import.

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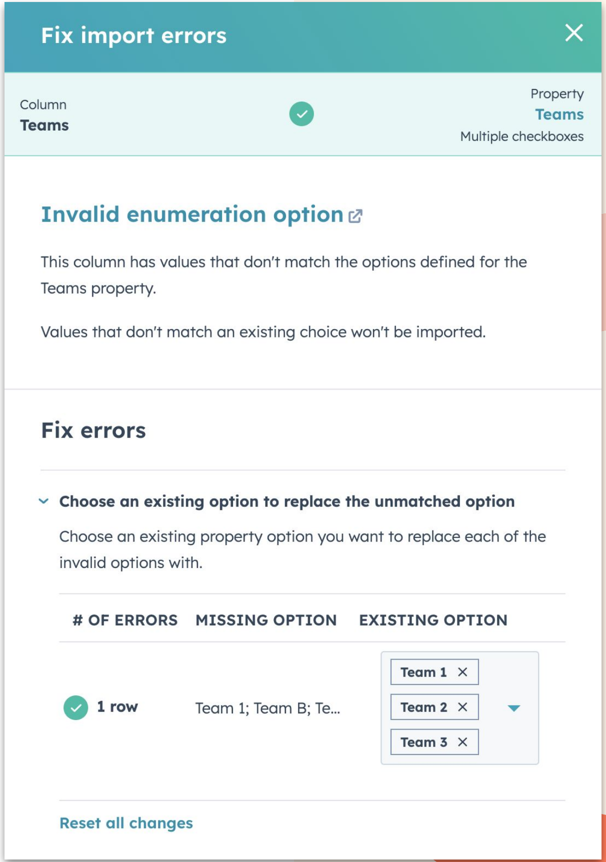
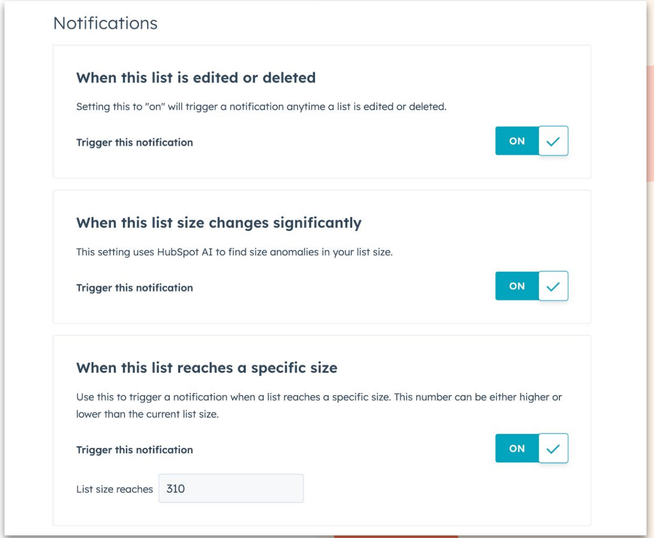


List Notifications

We're introducing List Notifications to help Enterprise customers be aware of critical list changes as they happen. Now, get notified when:

- A list is edited or deleted
- A list size changes significantly* (powered by HubSpot AI)
- A list reaches a specific size



Use Case

All lists are not created equal. As your company scales, you need to control and understand the significant events that lead to changes in your most important lists.

- Are you hosting an event with limited capacity? You can now receive a notification when your list reaches that capacity.
- Do you have a list of your most important customers? You can now receive a notification, powered by HubSpot AI, when your list suddenly drops or increases. This can help you quickly understand the impact of a campaign or any recent communications.

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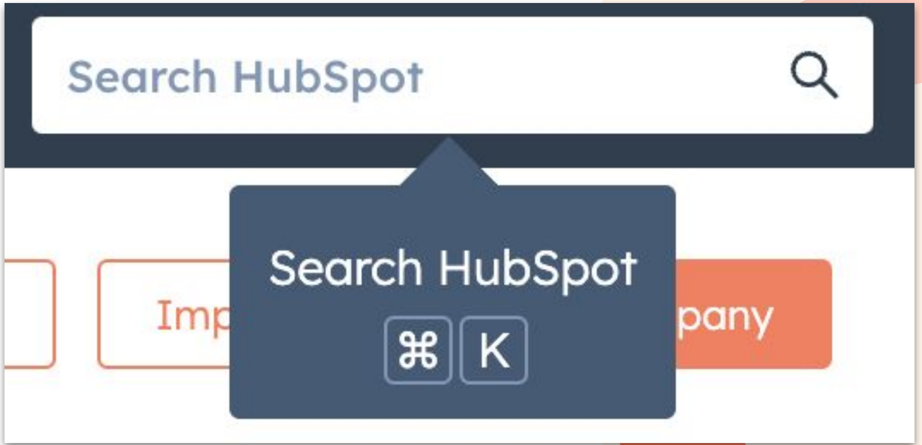
CRM Platform

Use Global Search through keyboard shortcuts

Now, you can use keyboard shortcuts to open and close Global Search and quickly navigate through the results.

Use Case

Searching for anything in Global Search required moving back and forth between the mouse and keyboard to click into Global Search, type a search term, and then scroll through and select a result. This was a user experience with lots of friction for efficiency.



[Learn More]

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Improved File Property Experience in HubSpot's Smart CRM

You are now able to upload and manage files using a custom file property in HUbSpot's CRM, enabling you to more seamlessly manage files across the Smart CRM.

Use Case

These enhancements to custom file properties will improve file management in HubSpot. Some examples of how they can be used:

- Requiring that a purchase agreement is attached to every new deal created using the 'Create Deal' form
- Requiring a file property based on the value of another property using conditional property logic
- Requiring a contract to be uploaded to a file property when 'Deal Stage = Closed/Won'
- Uploading a CV to a contact record, and control which users can access that property ('CV') using field-level permissions

Learn More

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Launch region: Global

CRM Email Permissions

A new permission is being added which can limit the ability for users to view logged emails and emails from connected inboxes. CRM emails are assigned to the primary sender or receiver of the email. The permission levels can then be set to owned, team, or all.

- Owned means only emails assigned to that user can be viewed.
- Team means only emails assigned to that user or to users on teams they are a part of.
- All means they can see all logged emails.

This does not impact marketing emails sent to contacts.

Use Case

Today when an email is sent or received from a contact from a connected inbox or logged manually, any HubSpot user with access to that contact (in that account) can see the email. This is an issue for many customers who have different employees exchanging a variety of information with contacts in their CRM, some of which shouldn't be viewed by all users in the account. A new permission is being introduced to limit access to logged emails in HubSpot.

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Launch region: Global

Expanding CRM Exports API Limits

We've expanded the daily exports limit for our CRM Exports API from 10 exports per day to 30 exports per day.

Use Case

Our customers use our Exports API to programmatically extract CRM Data out of HubSpot so they can integrate it with other tools they use, run external reports, and simply backup their data. When we initially launched the API, we kept our limits restrictive to ensure the performance of our system. At the same time, we had a means for expanding this limit for specific customers who needed a more lenient limit. For example, customers with many custom objects could very quickly come up against our 10 exports per day limit.

Now that we've improved concurrency limits specifically for our API exports, we're able to increase our Exports API limits for all customers.

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CRM Platform

Import Now Shows Potentially Impacted Workflows and Lists

We now surface property usage for lists and workflows directly within the import tool. This makes it easy to catch whether or not your import is going to unintentionally enroll records into a list/workflow that could lead to further downstream data quality issues.

Use Case

Now, you no longer need to cross-reference several different tools in HubSpot to understand whether or not your import is going to impact a list or a workflow.

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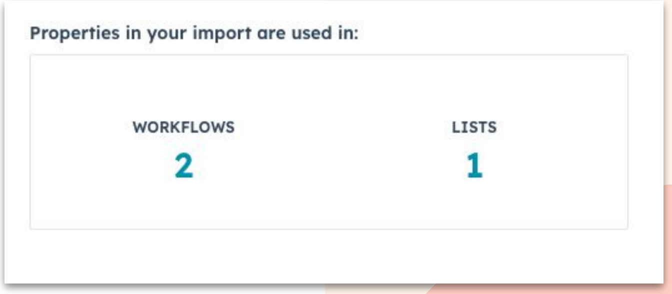

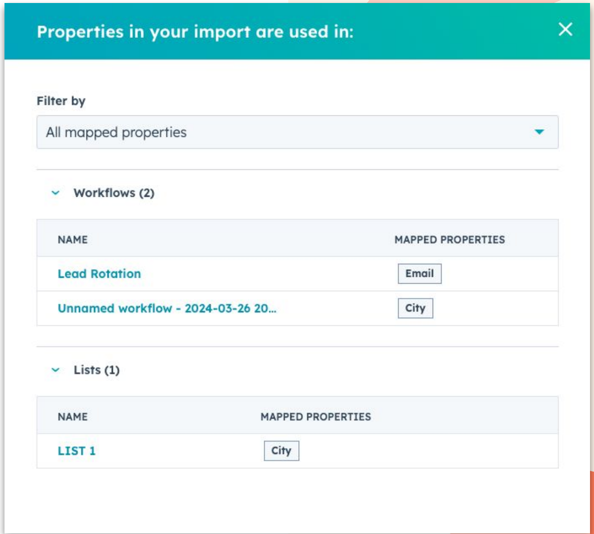

CRM Platform

Share Report and Dashboard Data via Email

Dashboards' reports data can now be shared via email. Data shares via email can be set to follow a recurring schedule; and are sent as an attachment in one of the three available options: csv, xls, xlsx.

Any individual report's data can also be shared via email and set to follow a recurring schedule. Report data is sent as an email attachment in one of the three available options: csv, xls, xlsx.

Use Case

With this release, we have expanded the Share function to also allow users to email Dashboard and Report data as well.

Please note, the export Report function is still available; however, it only allows users to send a one time email with the data attachment, to themselves. To send recurring emails with Report Data to multiple recipients, please use the Share function.

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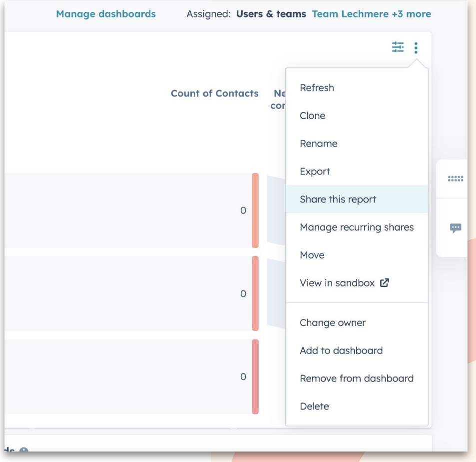
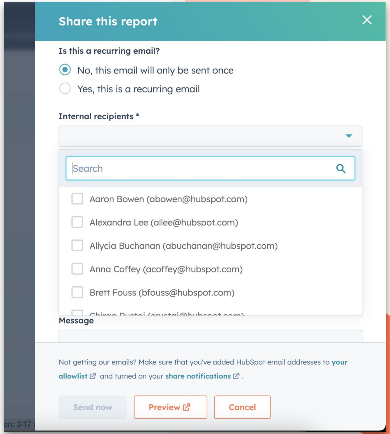


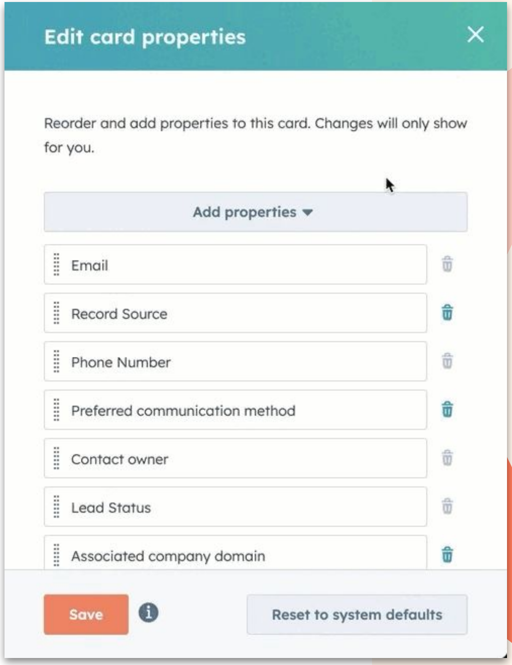


User Level Configuration of Properties on both Standard & Custom Objects

Users can now add, remove or re-order properties displayed on the record left sidebar for both standard and custom objects directly from the record page.

Use Case

With this rollout, users can now add, remove or re-order properties displayed on all standard and custom objects directly from the record. This is intended to empower all users to customize their records to meet their individual needs and boost their productivity.



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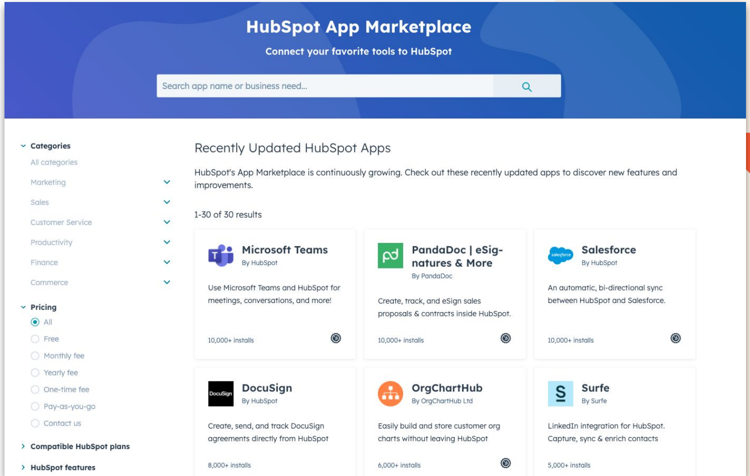
App Marketplace & Integrations

App Marketplace & Integrations

The New and Updated Q1 Collection

Explore 57 new apps in HubSpot's App Marketplace, such as the Teamwork.com Workflows app, simplifying project automation and client management. Plus, discover updates to more than 30 apps, with new added features that include:

- Microsoft Teams allows you to take quick actions from notifications, by responding to important updates directly in Microsoft Teams, which helps save time.
- PandaDoc | eSignatures & More now offers improved bi-directional sync with HubSpot, facilitating seamless data flow, custom workflows, and enhanced reliability, ultimately saving users time and minimizing errors.
- Salesforce and HubSpot now sync bidirectionally custom object data, making it easier to manage and keep data consistent between the two platforms.



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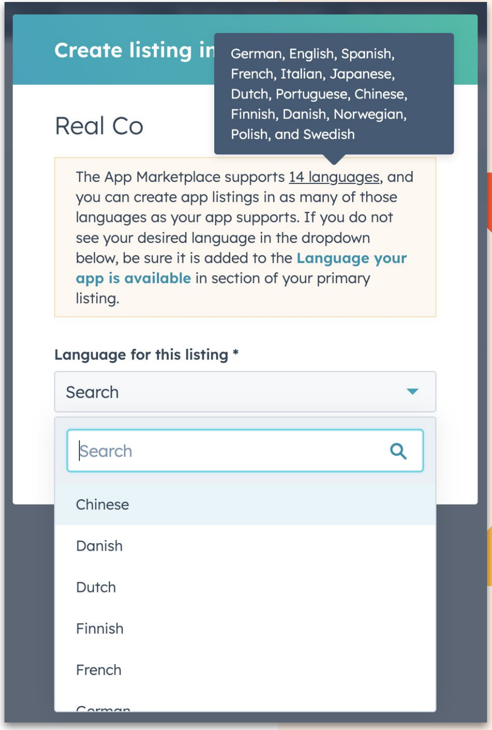
Launch region: Global

New Languages Available in HubSpot Marketplaces

Six new languages are available for localization in HubSpot's App Marketplace, Template Marketplace, and Solutions Directory – now including support for Danish, Finnish, Chinese, Norwegian, Polish, and Swedish.

Use Case

This update aligns with the official 14 languages supported by HubSpot and ensures anyone exploring a HubSpot marketplace can browse in their native language, if possible.



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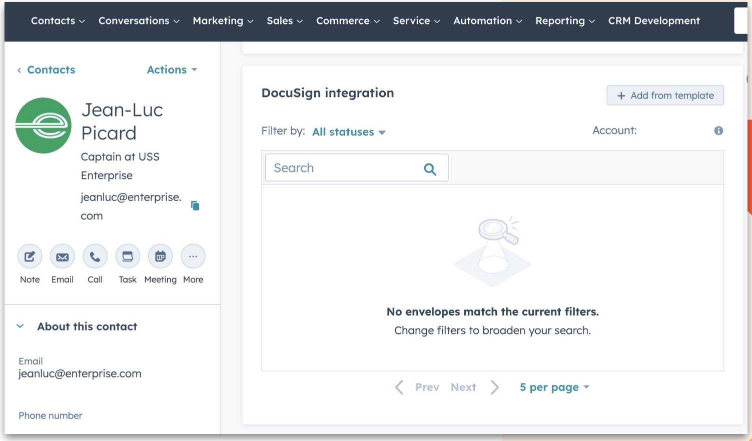
DocuSign Middle Panel Enhancements

The new DocuSign middle panel card will now allow you to manage your DocuSign envelopes and documents more easily. You can:

- Review and manage the status of your DocuSign envelopes directly from the contact, companies or deal record screen.
- Manage associations, attach or create new DocuSign envelopes.
- View envelope history and detail, like recipient status, senders and dates.
- Attach new DocuSign envelopes from templates and launch the envelope editor screen.



Use Case

With the recent enhancement to HubSpot's DocuSign integration, those obstacles are now overcome. You can effortlessly send documents to your prospects while maintaining seamless context within your workflow.

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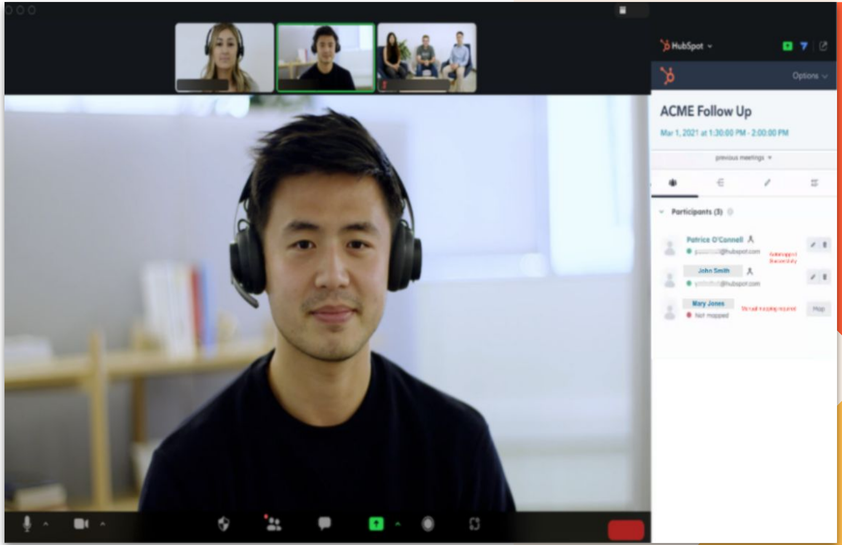
Auto-mapping now available in the HubSpot App for Zoom Meetings

Auto-mapping now available in the HubSpot App for Zoom Meetings! This feature will allow you to have all meeting participants mapped automatically when the relevant contact record is available in HubSpot. We use meeting participants' first and last names to match them to your contact records in HubSpot. We also look at previous matches from recurring meetings to ensure accuracy. If we cannot accurately match, we will let you know so that you can select or create the correct contact record for mapping.



Use Case

We have automated this process, so the host can stay fully engaged in their meeting, and be assured that all the notes and activities are accurately synced to the correct records in HubSpot.

[Learn More]

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App Certification Submission Limits

Starting today, app partners are limited to one app certification submission at a time. Simultaneous submissions will be rejected based on order of receipt, and once an app is certified, you are eligible to submit another.

Use Case

To give each app the attention it deserves, we are limiting submissions. This ensures fair access to certification resources, accelerates the review process, and reduces duplicative edits on future submissions. Certified apps appear under an additional filter on the HubSpot App Marketplace.

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Thank you